

Date: 22 July 2024

Version 1.0

Authority Process: Self-directed SMSF Trustees

1. Login to your Selfwealth account <https://secure.selfwealth.com.au/Account/Login>
2. Navigate to settings via the drop-down arrow in the right-hand corner of the screen.
3. Select the 'General' tab:

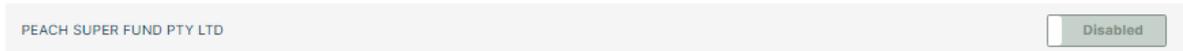


4. Scroll down to 'Class Settings' and toggle on to 'Enabled'.

Class Settings

Please select the accounts that you would like to activate Class Data feeds on.

By enabling the data feed feature, you authorise and agree for Selfwealth to share your data and personal information with the selected third party service in accordance with the [Selfwealth Privacy Policy](#) and the [Selfwealth Terms and Conditions](#)



From this screen, you can also toggle your data feed off to 'Disabled'.

5. If assistance is required, please contact the Selfwealth support team via email: support@selfwealth.com.au

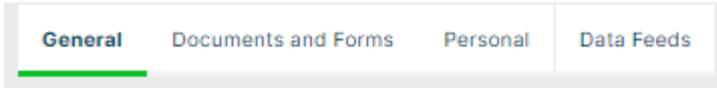
Authority Process: Accountants, SMSF Administrators or Advisers

Bulk consent:

1. Login to your Selfwealth account <https://adviser.selfwealth.com.au/Account/Login>
2. Navigate to settings via the drop-down arrow in the right-hand corner of the screen.

3. Select the 'Data Feeds' tab:

Settings



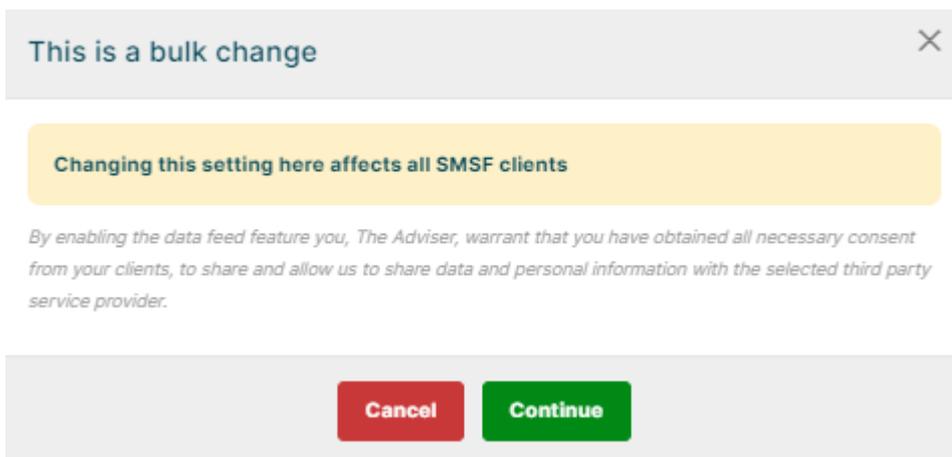
4. Under 'Bulk Data Feed Activation', toggle on to 'Enabled'.

Bulk Data Feed Activation



By enabling the data feed feature you, The Adviser, warrant that you have obtained all necessary consent from your clients, to share and allow us to share data and personal information with the selected third party service provider.

5. When you do, you will be notified that this is a bulk change, click 'Continue':



6. From this screen, you can also bulk toggle off all clients to 'Disabled'

Syncing new clients to the bulk consent:

7. If you add new clients after you have provided bulk consent, you will have the option to sync these new clients to the existing consented clients list.

Settings

[General](#) | [Documents and Forms](#) | [Personal](#) | **[Data Feeds](#)**

Bulk Data Feed Activation

Turn on Class data feeds on for all SMSF clients **Enabled**

 You currently have 1 SMSF client(s) that are not being sent to Class. To add them to the Class feed please click on "Sync Clients". [Sync Clients](#)

By enabling the data feed feature you, The Adviser, warrant that you have obtained all necessary consent from your clients, to share and allow us to share data and personal information with the selected third party service provider.

Refresh Data Feed ✕

Enabling this will include any new SMSF clients that have been added.

By enabling the data feed feature you, The Adviser, warrant that you have obtained all necessary consent from your clients, to share and allow us to share data and personal information with the selected third party service provider.

[Cancel](#) [Refresh and Continue](#)

If assistance is required, please contact the Selfwealth Adviser support team via email: adviserservices@selfwealth.com.au

Historic Data:

If you were a client of Selfwealth with trade information visible through Class before May 2023, the data for the period between 8 May 2023 and July 2024 will be visible once your consent is provided for Selfwealth to resume sending data to Class.

If assistance is required, please contact the Selfwealth support team via email: support@selfwealth.com.au