Selfwealth

Selfwealth Ltd ABN: 52 154 324 428, AFSL: 421789
Level 7, 130 Lonsdale Street, Melbourne VIC 3000

Date: 22 July 2024

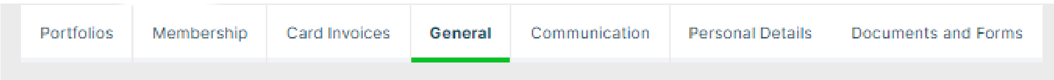
Version 1.0

Authority Process: Self-directed SMSF Trustees

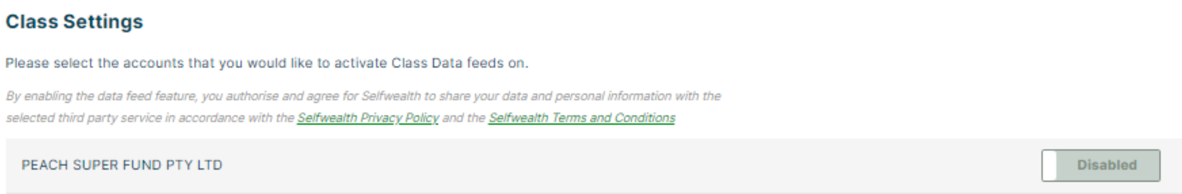
1. Login to your Selfwealth account https://secure.selfwealth.com.au/Account/Login

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'.



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

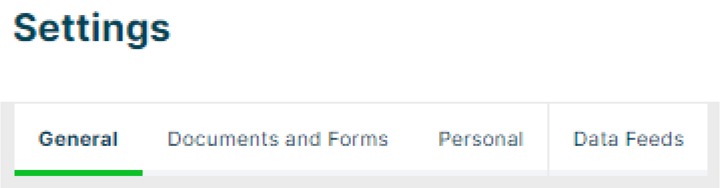
Bulk consent:

1. Login to your Selfwealth account https://adviser.selfwealth.com.au/Account/Login

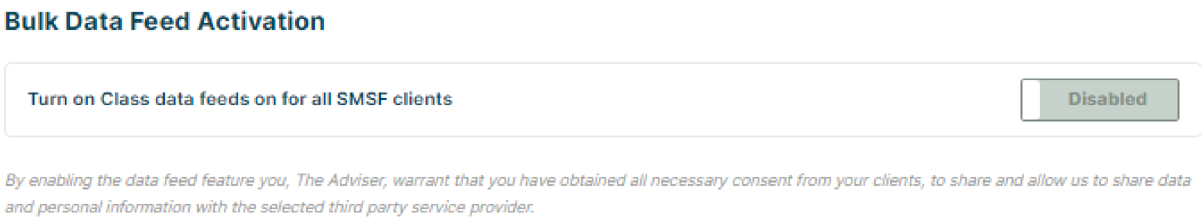
2. Navigate to settings via the drop-down arrow in the right-hand corner of the screen.

The information contained in this user guide is information only and makes no recommendation or gives any opinions. Accordingly, it is not financial product advice and should not be relied upon as financial product advice.

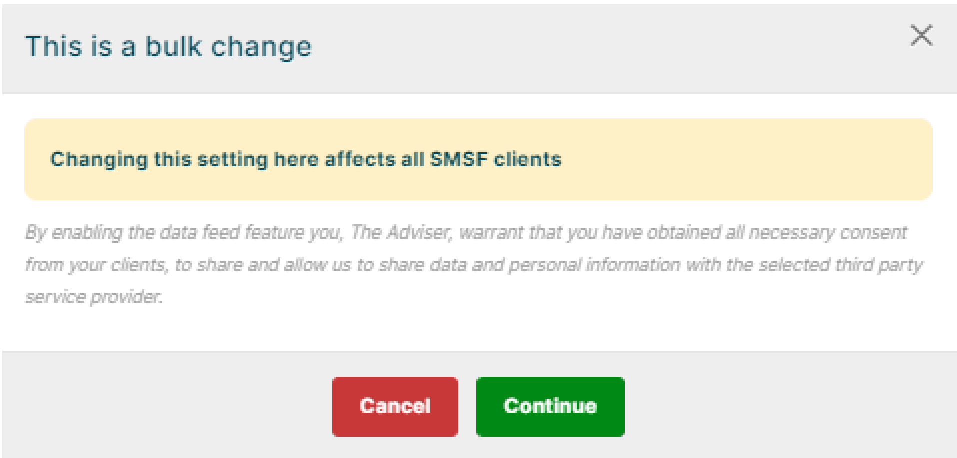
3. Select the ‘Data Feeds’ tab:



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



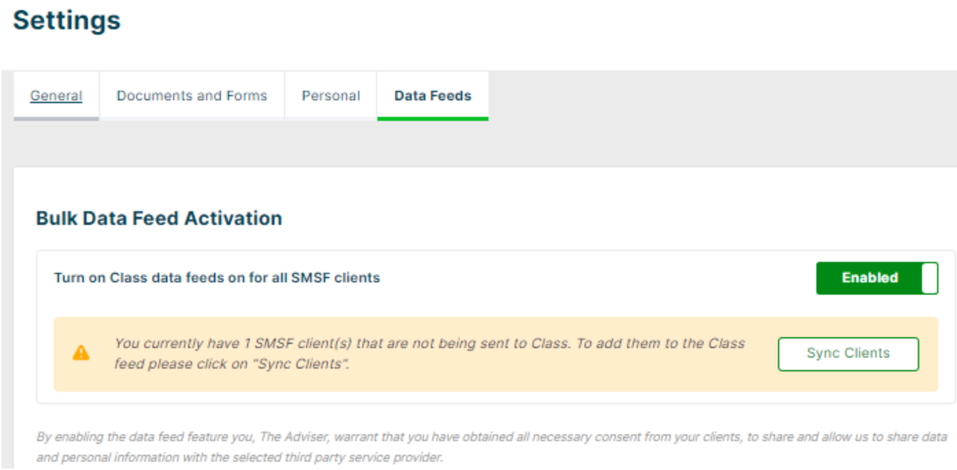
5. When you do, you will be notified that this is a bulk change, click ‘Continue’:

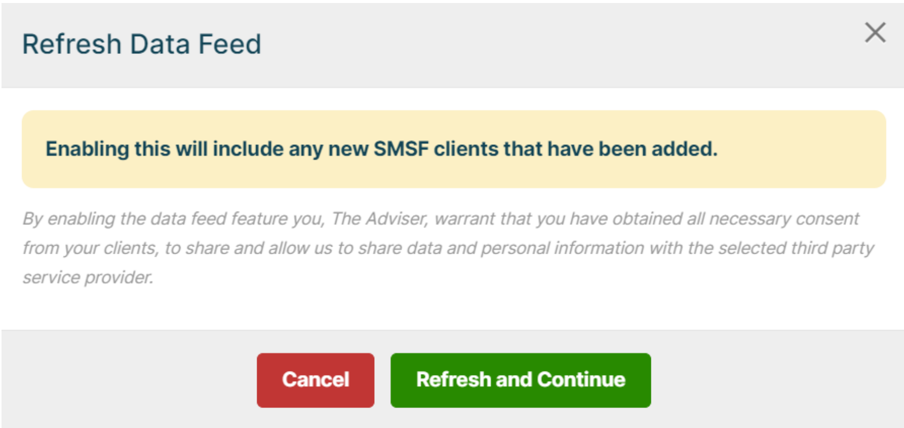


6. From this screen, you can also bulk toggle off all clients to ‘Disabled’

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.





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