

Authority Guide for SMSF Trustees

Version: 1

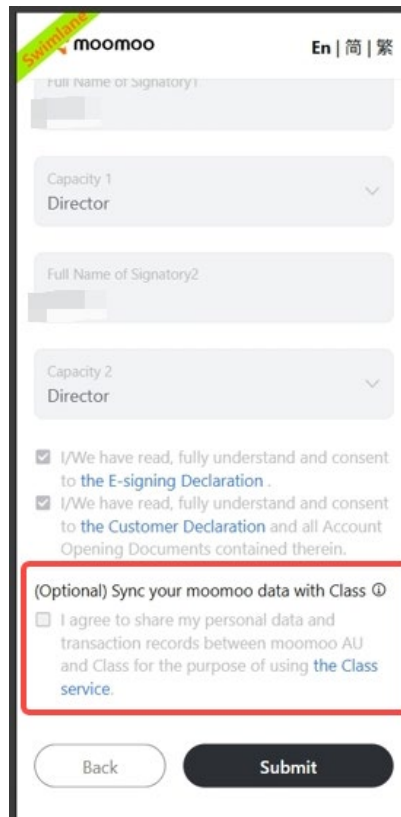
1. Initial Authorisation

For moomoo SMSF trading accounts opened after 30 June 2026

For clients who are opening a new SMSF trading account with moomoo, authorisation can be provided during the account opening process.

At the final step before submitting the account opening application, clients will see the option **“Sync your moomoo data with Class”**.

To authorise the data feed, select this option and submit the application. Once authorised, moomoo will be able to share the relevant account and transaction data with Class for the purpose of the Class data feed service.



The screenshot shows the moomoo mobile app interface for account opening. At the top, there is a 'Submit' button in a green banner, the moomoo logo, and the text 'En | 简 | 繁'. Below this are several input fields: 'Full Name of Signatory1', 'Capacity 1' (set to 'Director'), 'Full Name of Signatory2', and 'Capacity 2' (set to 'Director'). There are two checked checkboxes: 'I/We have read, fully understand and consent to the E-signing Declaration.' and 'I/We have read, fully understand and consent to the Customer Declaration and all Account Opening Documents contained therein.' A red box highlights the optional section: '(Optional) Sync your moomoo data with Class ⓘ' with an unchecked checkbox and the text 'I agree to share my personal data and transaction records between moomoo AU and Class for the purpose of using the Class service.' At the bottom, there are 'Back' and 'Submit' buttons.

2. Activating Authorisation

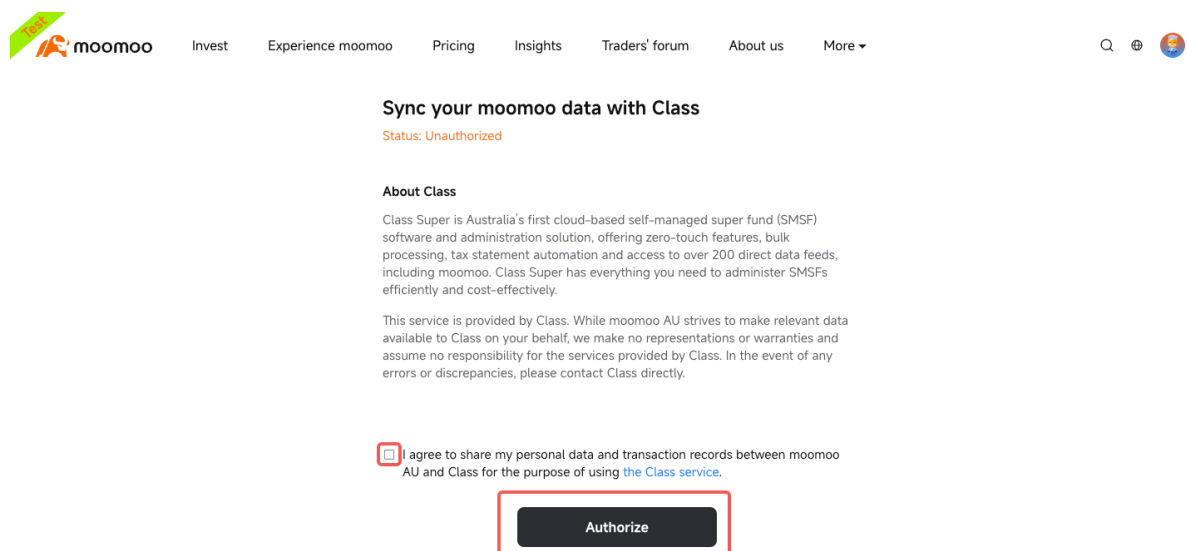
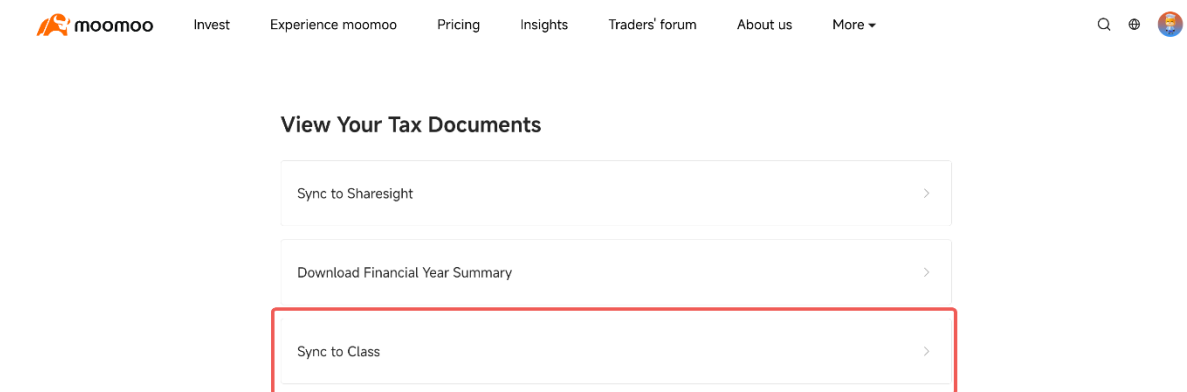
For moomoo SMSF trading accounts opened before 30 June 2026

For clients who already held an SMSF trading account with moomoo before 30 June 2026, the data feed authorisation can be activated either via the moomoo website or through the moomoo app.

Option 1: Via the moomoo website

Visit <https://documents.au.moomoo.com/document/guide>

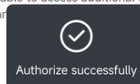
Log in using your moomoo credentials, then follow the on-screen instructions to authorise the Class data feed.



Sync your moomoo data with Class

Status: Authorized

You have authorised Class to access your personal data and financial records. If you revoke this authorisation, moomoo will stop sharing new data with Class. Records already shared may still be retained by Class, but they will no longer receive new updates or be able to access additional data from your moomoo account. This may disrupt any services being provided through Class.



Option 2: Via the moomoo app

In the moomoo app, go to:

Accounts tab → All → scroll to Account section → Tax → Sync to Class

Then follow the prompts to authorise the Class data feed.

3. Removing Authorisation

Clients may remove their authorisation at any time via the same website or app pathway.

Via the moomoo website

Visit:

<https://documents.au.moomoo.com/document/guide>

Log in using your moomoo credentials, select “**Sync to Class**”, and follow the prompts to remove your authorisation.

Via the moomoo app

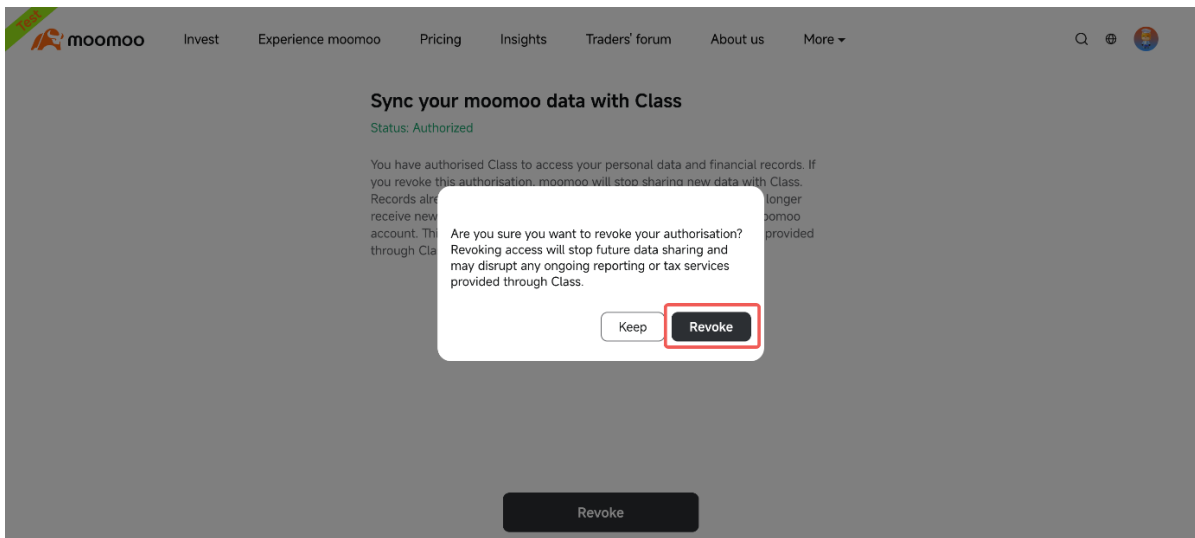
Go to:

Accounts tab → All → scroll to Account section → Tax → Sync to Class

Then follow the prompts to remove your authorisation.

View Your Tax Documents

- Sync to Sharesight >
- Download Financial Year Summary >
- Sync to Class >



Sync your moomoo data with Class
Status: Authorized

You have authorised Class to access your personal data and financial records. If you revoke this authorisation, moomoo will stop sharing new data with Class. Records already shared will remain available to Class. You will no longer receive new data from moomoo. You will also no longer receive new data from moomoo through Class.

Are you sure you want to revoke your authorisation? Revoking access will stop future data sharing and may disrupt any ongoing reporting or tax services provided through Class.

Keep Revoke

Revoke

Sync your moomoo data with Class

Status: Unauthorized

About Class

Class Super is Australia's first cloud-based self-managed super fund (SMSF) software and administration platform. It offers features, bulk processing, tax statement generation, and direct data feeds, including moomoo. Class Super is designed to help you administer SMSFs efficiently and cost-effectively.

This service is provided by Class Super. To make relevant data available to Class on your behalf, we make no representations or warranties and assume no responsibility for the services provided by Class. In the event of any errors or discrepancies, please contact Class directly.

I agree to share my personal data and transaction records between moomoo AU and Class for the purpose of using the Class service.

Authorize

4. Historical Data

When a client first authorises the Class data feed, moomoo will send the relevant historical transaction data to Class. This may cover up to two prior financial years, depending on when the authorisation is provided during the financial year.

After the initial authorisation, relevant data will be sent to Class automatically on an ongoing basis.

Please note that if a client removes their authorisation and later re-authorises, moomoo will send the relevant data from the gap period once authorisation is restored.

For example, if a client first authorises the data feed on 1 July 2026 and removes the authorisation on 15 July 2026, the data from 1 July to 15 July 2026 will be sent to Class once the client re-authorises.

For more information, please contact moomoo customer service or email support@au.moomoo.com.