Activating SMSF data feeds on FirstNet Adviser

Step 1

Login to FirstNet Adviser.

Step 2

Search for the client you wish to activate a SMSF data feed for in the 'My Clients' tab.



Step 3

Select the account that you would like to activate the data feed for by clicking on the account number.

Step 4

On the left hand side, under 'Client account', select 'SMSF data feeds'.



Step 5

The screen will display the default settings, click the **'click here'** link to update the settings:

Please note, if your client has not selected adviser authority to activate the data feed on their behalf, the **'click here'** button will not be visible. Your client is able to do this on FirstNet Investor or by calling Investors services on 13 13 36.

Change data feed settings	
To change data feed settings <u>click here</u> .	
Current data feed settings	
Account Name: 91.3, Staging Product	
Provider Name	Data feed
BGL Corporation	Active
Class Super	Inactive

Step 6

Select the SMSF administrator you will like to activate the data feed for, read the Terms and Conditions and click 'Next'.

Enter data feed settings	Step 1 o	
Current data feed settings		
Account Name: 91.3, Staging Product		
Provider Name	Data feed	
BGL Corporation		
Class Super		
By selecting a data provider(s) and successfu • you confirm that the account nominat • you understand and agree that Coloni 232468 ("Colonial First State") will be account balance) details ("Data"), in method as Colonial First State agrees. Please de-select and complete the security va rowinder(6)	IIIy completing the security validation set out on the next page: ed above relates to a self-managed superannuation fund; and al First State Investments Limited ABN 98 002 348 352 AFS Licence disclosing current and historical account and transactional (including ediation to the account nominated above, by electronic file (or such other) to the data provider(s) selected above.	



Step 7

Enter your password and click 'Submit'.

For your security	
Please enter your password to proceed with this change	
	Cancel Back Submit

Step 8

A confirmation screen will be displayed.

Want more information?

Please speak with your local Business Development Manager or visit our website at colonialfirststate. com.au/adviser. Alternatively, you can call us on 13 13 36.

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