



Checklist

1. Check Authority to proceed is signed
2. Print forms for client signature (if required)
3. Follow up client to sign forms
4. Rollover funds pending new insurance confirmation
5. Check if new insurance is in place
6. Lodge forms online or submit forms to provider
7. Follow up provider for confirmation of receipt of application
8. Lodge adviser fee consent (If Required)
9. Ensure signed documents are saved in Xplan
10. Email super confirmation to Client once account is opened ⚠
11. Check new super contributions are in place
12. Update Xplan record and compliance section