



Super
Concepts



Australian Executor Trustees

AET and SuperConcepts

Referral Program FAQ

AET AND SUPERCONCEPTS REFERRAL PROGRAM FAQ

Q: Why was the decision made to transition out of the Platform business?

A: Australian Executor Services Limited (AETL) was acquired by Equity Trustees Limited (EQT) on 30 November 2022. EQT's core focus is on trustee services and not administration and custody, leading to the decision to exit the Platform service.

Q: What was announced on 22 August 2022?

A: On 22 August 2022, the acquisition of AETL by EQT was announced. As part of that announcement, it was mentioned that EQT would be exiting the Platform service.

Q: Where can I go for the administration needs of my SMSF or portfolio?

A: With the needs of our customers in mind, we have worked with SuperConcepts to provide you with an easy solution to meet your future administration needs.

Q: Why were PMS and SMSF clients chosen to transition to SuperConcepts?

A: Upon reviewing our combined services and product offerings, we identified that PMS and SMSF clients would have a better option to be serviced by SuperConcepts due to their specialist administration capabilities in this area.

Q: Who is SuperConcepts?

A: SuperConcepts has been a leading administrator in the SMSF and portfolio industry for over 30 years. They provide award-winning SMSF and investment administration technology solutions, making them ideal for a simple transition. SuperConcepts is known for its end-to-end technology and administration capabilities, high-level information security accreditations, and extensive technical expertise.

Q: What benefits do SuperConcepts offer to clients and advisers?

A: SuperConcepts offers real-time administration solutions that aim to simplify SMSF and Portfolios. The online dashboard provides 24/7 access to investment reporting, member details, document libraries and more. Our services enhance efficiency and provide a digital delivery of information.

Q: Why chose SuperConcepts?

A: Upon reviewing our combined services and product offerings, we identified that PMS and SMSF customers would be better serviced by SuperConcepts as a result of their specialist administration capabilities in this investment area.

In recommending SuperConcepts, we have conducted due diligence discussions with respect to their security and ability to provide ongoing administration services with minimal disruption.

Q: When were advisers informed about the upcoming changes?

A: Advisers received correspondence on Friday, 1 September, about AET's intention to cease providing PMS and SMSF services from 22 December. Customers were advised of a 90-day notice period on 22 September.

Q: How can advisers support their clients during this transition?

A: Advisers can access their client list and detailed information on the AET My Portfolio online portal and contact either AET or SuperConcepts on the transition steps. Advisers are encouraged to guide their clients through this process and discuss their options, including the transition to SuperConcepts.

Q: How will AET and SuperConcepts help with the transfer of my administration?

A: Both AET and SuperConcepts are collaborating closely to make the transfer process as simple and as stress free as possible.

Q: How do I start the process of moving to SuperConcepts?

A: With your privacy in mind, to move to SuperConcepts, you'll need to complete a form giving SuperConcepts consent to access information AET holds about your SMSF or portfolio. You can find forms on www.superconcepts.com.au/aet. Please print and sign the form, noting your AET customer number and return it to SuperConcepts.

SuperConcepts will then work with AET to begin the process of transitioning the administration of your SMSF or portfolio.

Q: How have client and adviser safety and convenience been considered during this transition?

A: Extensive due diligence with SuperConcepts was undertaken to ensure a smooth, streamlined transition with minimal disruption to advisers and clients.

Q: Will there be any disruptions to my services during the transition?

A: Partnering with SuperConcepts ensures AET customers an easy transition with minimal disruptions. If there are any anticipated interruptions or changes, clients will be notified in advance.

Q: What if I wish to use an alternative provider?

A: If you wish to use an alternative provider, you'll need to complete the AET termination of service form, which can be accessed by contacting AET. In this form, you'll have to nominate your new administrator.

Q: Where can I get more information about the transition?

A: A website has been developed to specifically guide you through the transition process and to clearly outline available options. Customers can visit <https://superconcepts.com.au/aet> for more detailed information.

Q: Who can I contact for more details about SuperConcepts and their offerings?

A: Customers can contact their respective customer service teams at AET or SuperConcepts for any queries.

For Portfolio Management Services, please contact Anngelynna Bong from SuperConcepts at Anngelynna.Bong@superconcepts.com.au or 1300 023 170.

For SMSF queries, please contact Adam Skillitzi from SuperConcepts at Adam.Skillitzi@superconcepts.com.au or Mark Shaw at Mark.Shaw@superconcepts.com.au, both available at 1300 023 170.