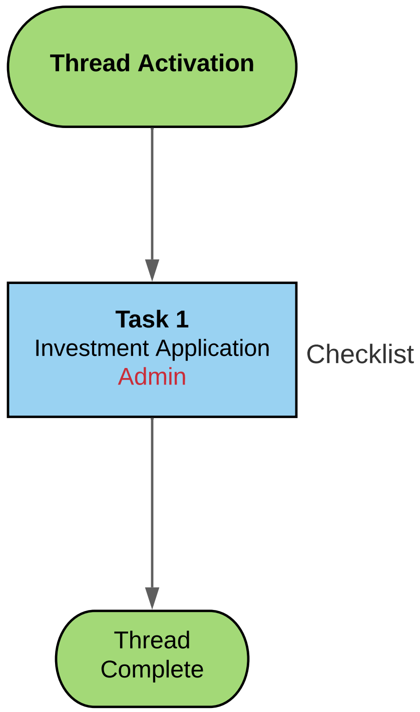

1. Check Authority to proceed is signed
2. Print forms for client signature (if required)
3. Follow up client to sign forms
4. Lodge forms online or submit forms to provider
5. Follow up provider for confirmation of receipt of application
6. Lodge adviser fee consent (if required)
7. Ensure signed documents are saved in Xplan
8. Email confirmation to Client once account is opened
9. Check Invest/Transact has been completed as per advice document
10. Confirm regular investment are in place
11. Update Xplan Compliance Fields (e.g. Manage next review)