

# myPerpetual FAQs

## Adviser

### How do I set up my access or change my access level?

- Access myPerpetual Adviser portal via this link: [adviser.myperpetual.com.au](https://adviser.myperpetual.com.au)
- Select the Reset Password option and provide your Adviser ID and registered email address (your Adviser ID is the 11 character code beginning with CH that appears on the commission reporting statements provided to your dealer group)
- Upon successful verification, a temporary password will be sent to your registered email address and you will need to complete the steps to enrol in Cisco Duo security.

**Note:** Your account level access on myPerpetual may be set up as either transact or view only. Please contact us if you do not have an email registered or if you wish to update your access level.

### I do not wish to use TFA – do I have to?

We are using two factor authentication (TFA) via Cisco Duo Mobile App to enhance the security of the portal. Cisco Duo uses asymmetric cryptography, keeping only the public key on our servers and storing private keys on your users' devices in a tamper-proof secure element. Duo never stores your passwords – meaning your logins stay safe. If you do not wish to download the Duo Mobile app, you can elect to receive the one-time PIN via SMS during the enrolment process.

### I use a practice login – who will authenticate?

There will be one Adviser ID only associated with authenticating your login. We are recommending all those that use a practice login to move across to adviser named logins.

### How do I set up access for my support staff?

Please complete the "Adviser Registration and myPerpetual Delegate Access Form" available in the Forms section under "Advisers" at <https://www.perpetual.com.au/myperpetual-help>. Please note that support staff are set up with their own logins and your level of online access will extend to your support staff and authorised delegates.

### What do I do if I have forgotten my password?

Simply click on "Reset Password" on the myPerpetual login screen and enter in your credentials. A temporary password will be sent to your registered email address.

### Who do I call for help?

Please contact us on 1800 062 725 during business hours (Sydney time) and we will be able to assist you.

### What transactions can I complete online?

If you have transaction access for your client(s) you can perform the following transactions online in myPerpetual:

- Investments – additional and regular contributions
- Switches
- Withdrawals and regular withdrawals
- Updates to investment strategy
- Update personal and client details including home phone, email and address

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- Maintain distribution method for your clients' investments
  - Manage pension payments for your client(s)

**Are my transactions effective in real time?**

Most requests will be in real time and take effect immediately such as updates to investment strategy, email and home phone number changes etc. However, transactions such as a switch, investment or withdrawal submitted online will generally be in a pending status waiting on the applicable price for your selected fund(s). These transactions will appear in priced status in 3-5 business days.

**Is there a difference between doing a transaction online or via form?**

All transactions received whether it be by form or online will be processed effective of the date of receipt – so long as the request is received by 3pm (Sydney time) that day the transaction will be processed with the effective date of that day. Where it is received after 3pm (Sydney time) the following days unit pricing will be used.

**What is the cut off time for online transaction requests?**

3pm (Sydney time)

**Will I get notified when the transaction is complete?**

You will receive a confirmation when the transaction is initiated via SMS and email provided your details are recorded in the system.

**Is the email/SMS I received confirming my transaction or just receipt of receiving the request as its not showing online as yet?**

We send SMS and email to confirm the receipt of transactions. Please check again to see if the transaction is now processed and showing in myPerpetual in pending or priced status.

**Why can't I see the fund I want to transact on?**

If you cannot see the investment you wish to transact on please contact us for assistance.

**When will you have a mobile application to access details?**

We do not have any immediate plans for a mobile application however you can access myPerpetual via your web browser on your mobile device. The website will adjust its size to be compatible with all mobile devices and tablets.

**More information**

Adviser Services: 1800 062 725  
Email: [investments@perpetual.com.au](mailto:investments@perpetual.com.au)  
perpetual.com.au

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