

End of Financial Year 2024/25 Cut-off Dates

As the end of financial year approaches, please be aware of the cut-off dates for processing transactions. Requests received after the cut-off dates may not be finalised until after the end of financial year.

Note: Please review notifications you receive from the platform, which may include outstanding or additional requirements to be actioned.

Process	Details	Cut-Off Dates
New applications (IDPS and Super Accumulation)	Clients to accept online application form summary	12pm, Friday 27th June
Fees	All ad-hoc fee requests that require authorisation to be submitted via the platform with no outstanding requirements	12pm, Friday 27th June
New applications - Pension	<p>Including establishing a new pension with the first payment either pre or post 30 June 2025.</p> <p>NB - must receive all information required to establish pension:</p> <ul style="list-style-type: none"> - pension payment details form; - copy of bank statement; - rollovers received; - Client has accepted online application form summary <p>If you wish for the pension to be set up after 1 July, please specify this on the application via the 'pension start date'</p>	5pm, Monday 23rd June
Pension amendments intended for June payments	Amendments to twice monthly payment scheduled for 24 June 2025	5pm, Tuesday 17th June
Pension amendments	To amend pension payment details before EOFY	5pm, Monday 23rd June
Benefit payments and withdrawals/redemptions (excluding pension payments)	<p>Appropriate paperwork and any applicable supporting information such as certified identification and residency confirmation for the request, must be received by the cut-off date.</p> <p>The client must have sufficient cash account funds available to allow the payment to be processed</p>	5pm, Monday 23rd June
Contributions	<p>EFT and Direct Debit - we strongly suggest clients plan and instruct their financial institution at least 2-3 days prior to the cut-off date.</p> <p>Appropriate paperwork for the contribution and any supporting information must also be supplied.</p> <p>**Div290 to be sent with any personal contributions** or to be kept as non-concessional</p>	5pm, Monday 23rd June
Superannuation splitting	Contribution splitting - to apply for contribution splitting to an eligible spouse	5pm, Monday 23rd June
Account Conversions	Account conversion documents must be uploaded and triggered prior to cut-off date	5pm, Monday 16th June

The above cut-off dates are based on the assumption that all information received by the cut-off dates is complete and accurate.