AustralianSuper

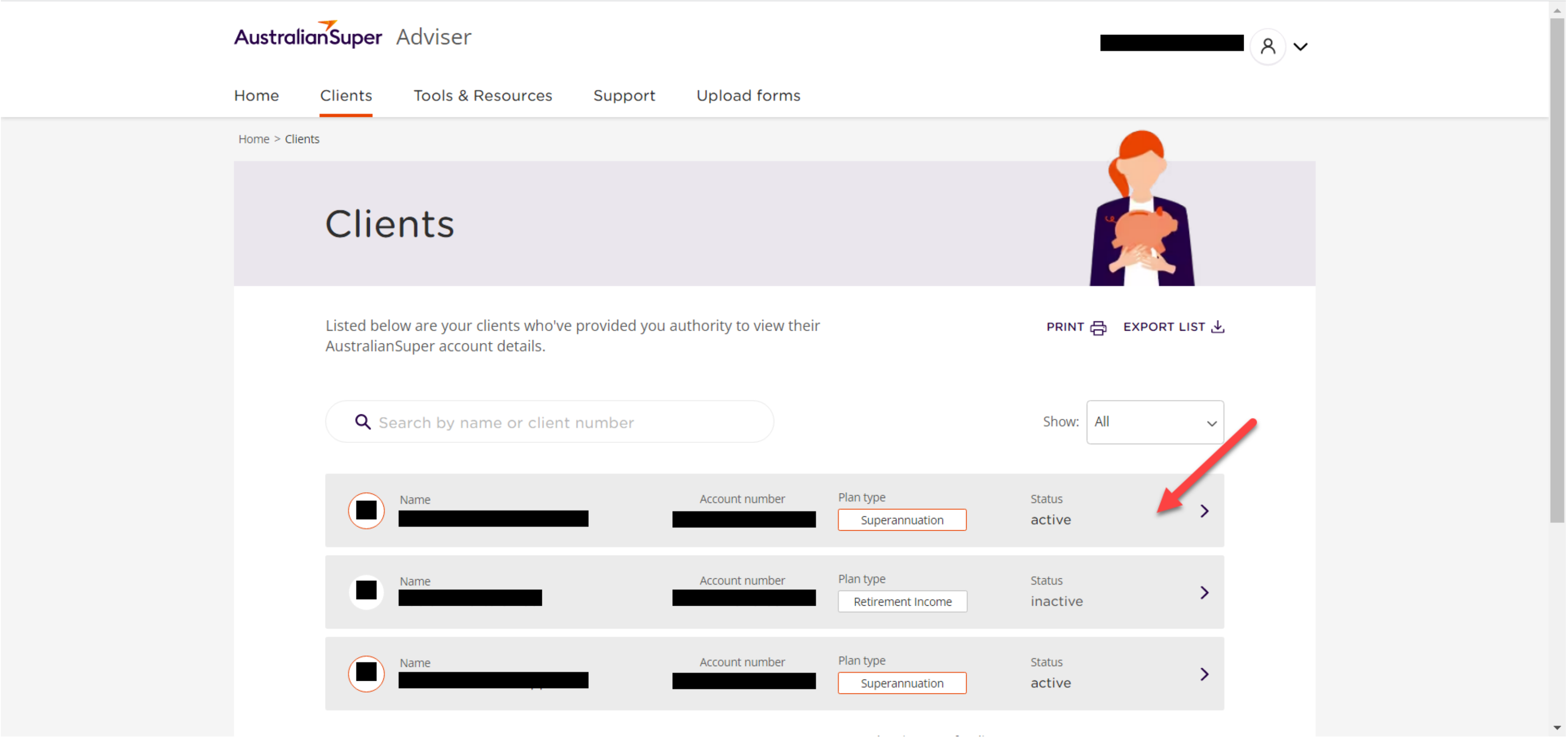
Adviser Portal: Extracting Centrelink schedules and Client profile reports

A how to guide

13 December 2023

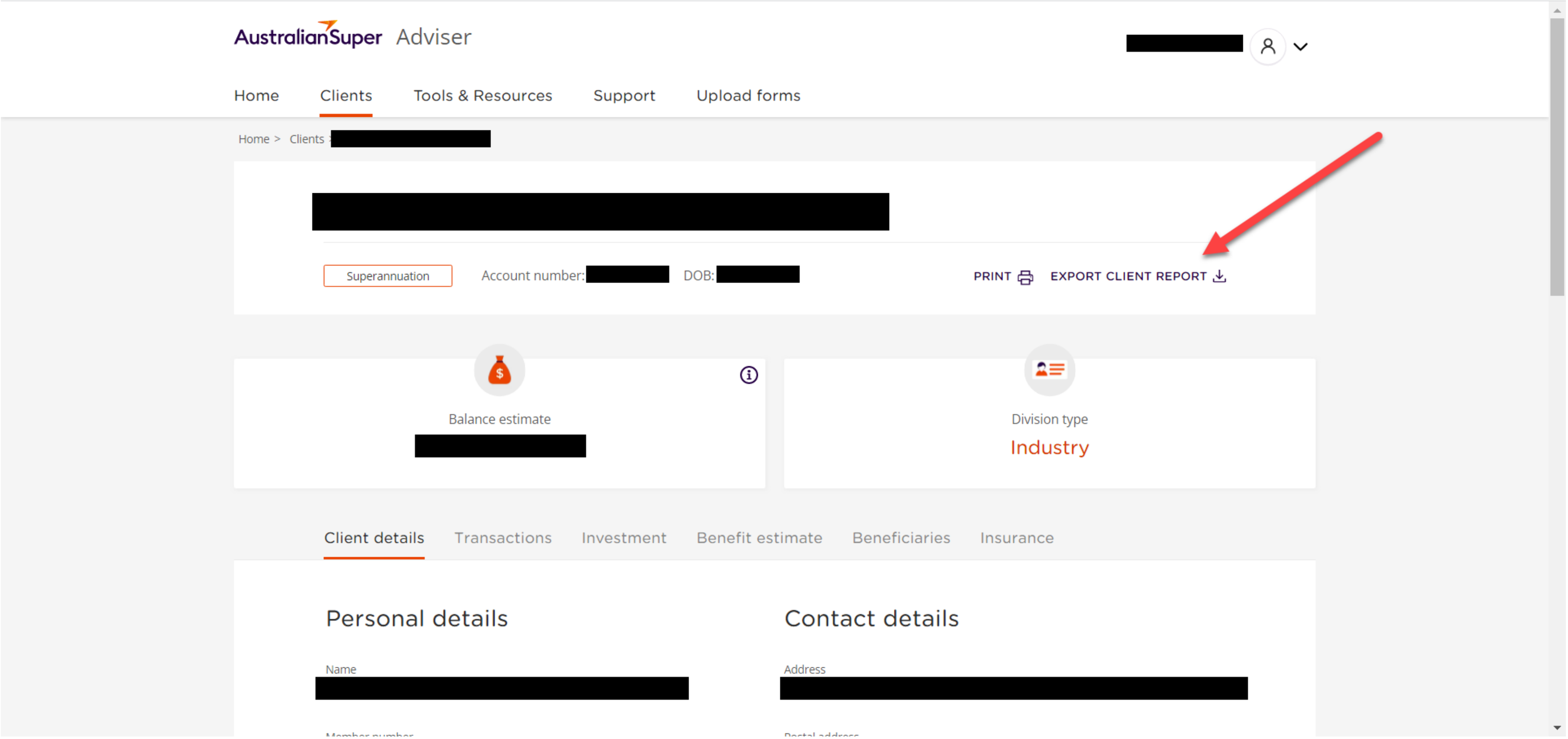
Print a client profile

1. Select a client from the list in the ‘Clients’ page



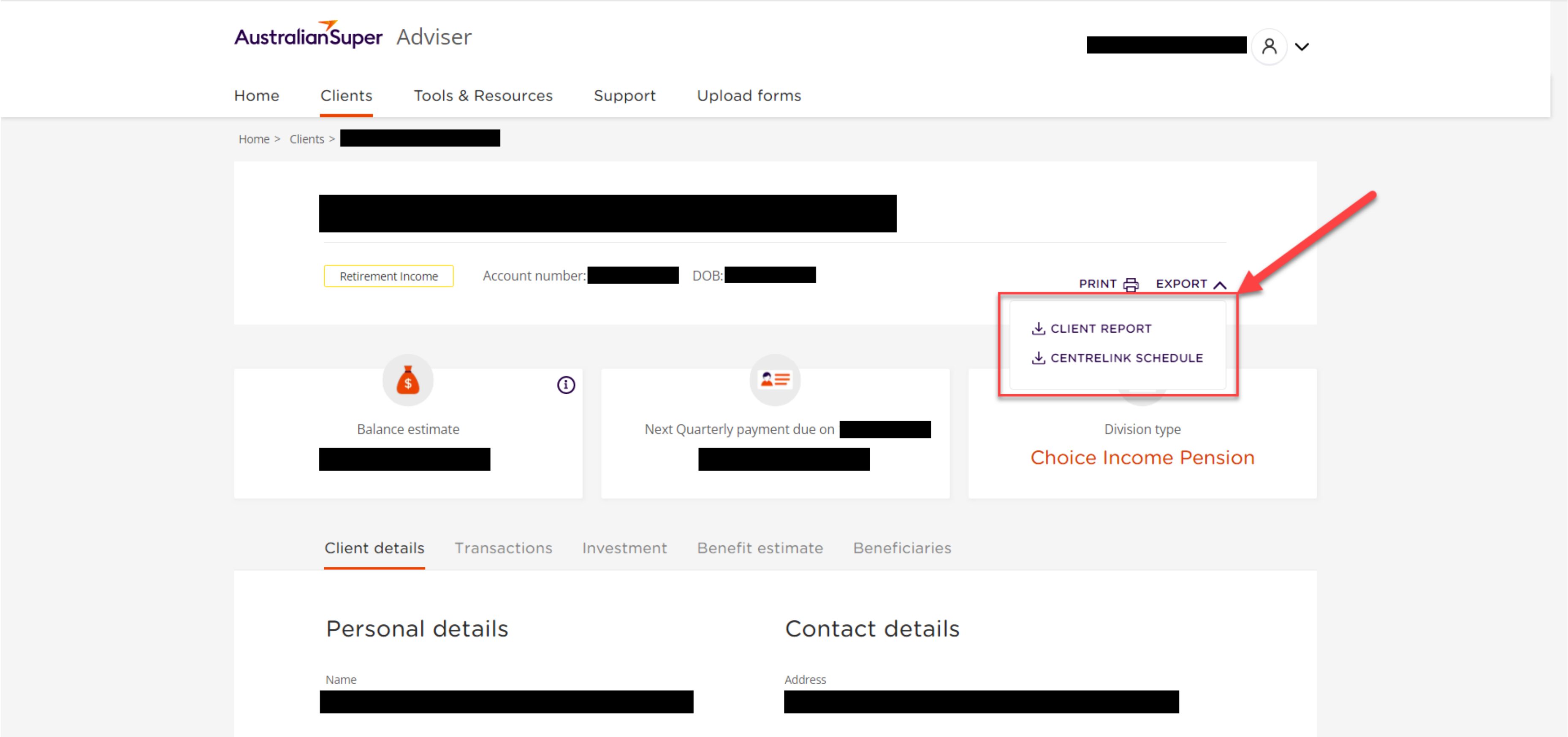
Export Client Report

2. In your client’s profile, select “Export Client Report”. The Adviser Portal will generate a client profile report as a PDF file and save the file to your desktop. (This may take up to one minute.)



Export a Centrelink Schedule

3. If you have a Choice Income client, you have the option of exporting a Centrelink Schedule. Select Export, and choose between the two options:



More information

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