



# Firstmac Money Guide



# Table of Contents

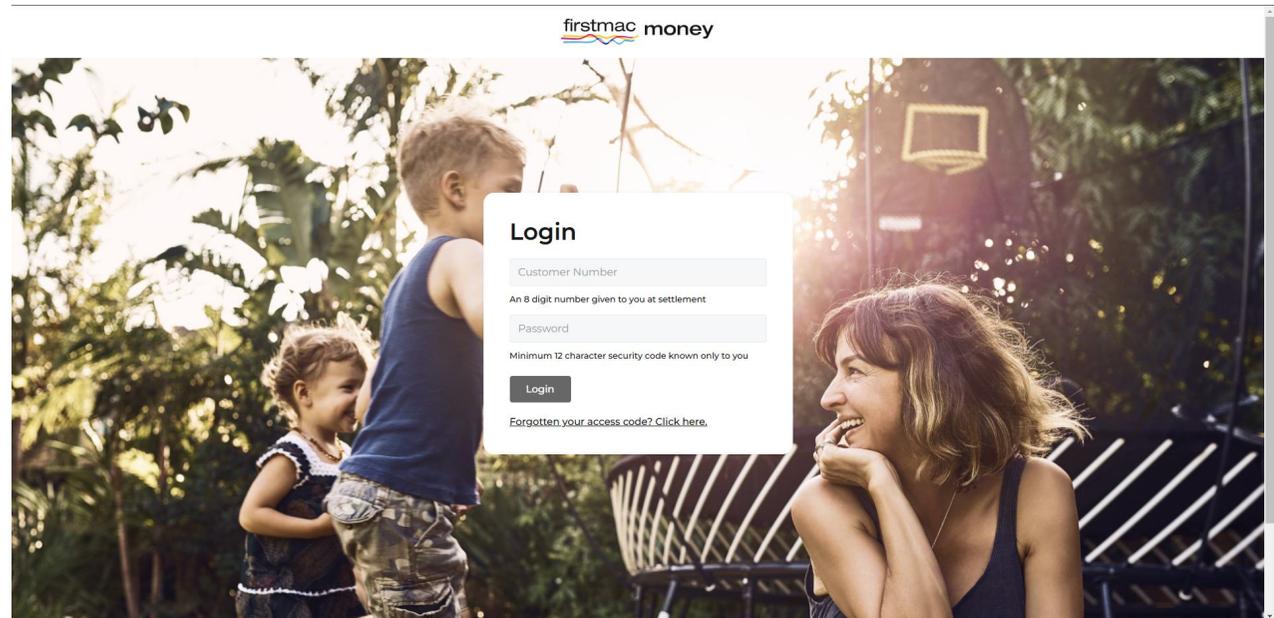
Log In	01
Main Menu	02
Accounts	03
Pay	04
Messages	05
Manage	06
Manage - Accounts	07
Manage - Documents	09
Manage - Loan Services	10
Manage - Statements and Notices	12
Manage - Tips & Help	13
Manage - Contact us	14
Manage - Profile	15
Manage - Security	16

## **How to use Firstmac Money**

# 01 Log In

To log in, you will need your **Customer Number** and **Access Code**. These can be found on your welcome letter.

If you have forgotten your Access Code, you are able to reset it by clicking **"Forgotten your access code? Click here."**



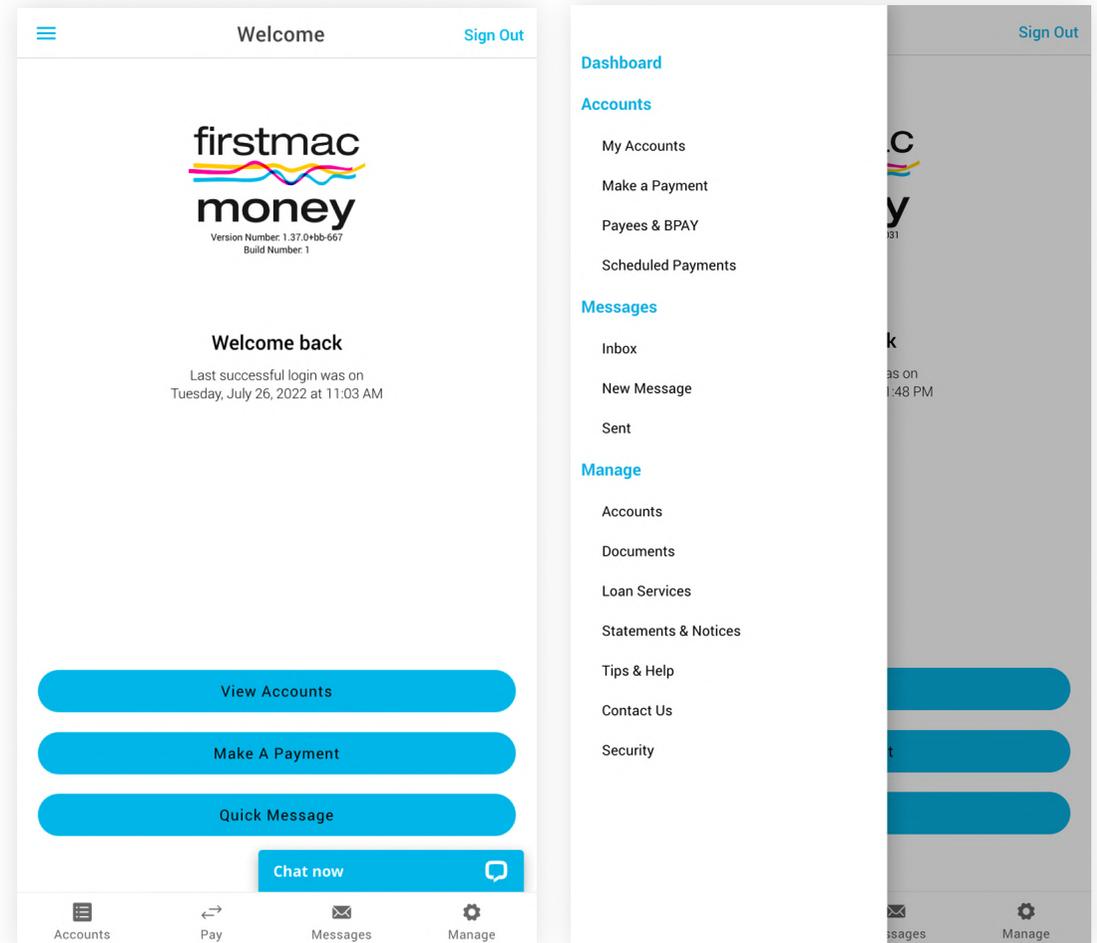
## 02 Main Menu

In Firstmac Money, there are three main actions for you to take: **View Accounts**, **Make a Payment** and **Quick Message**.

There are four areas to access: **Account**, **Pay**, **Messages** and **Manage**, which will be detailed in the following pages.

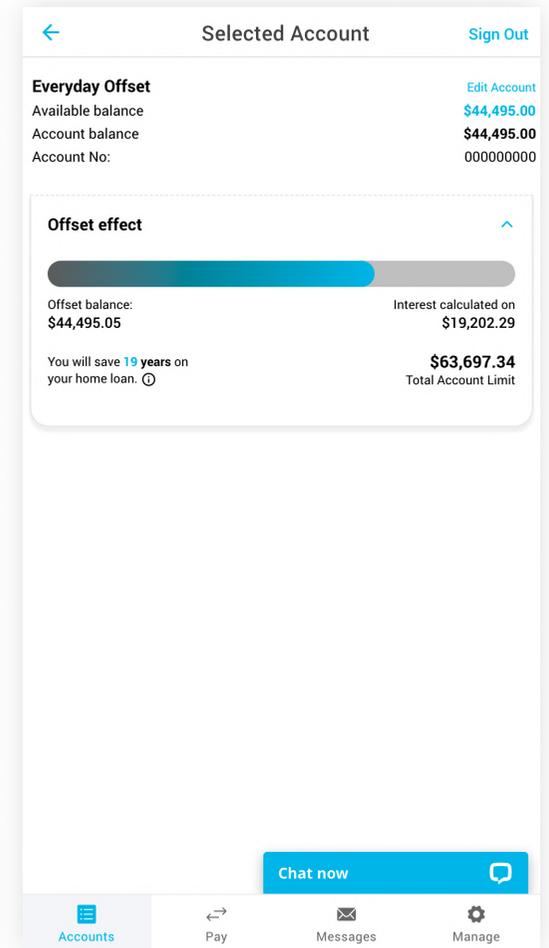
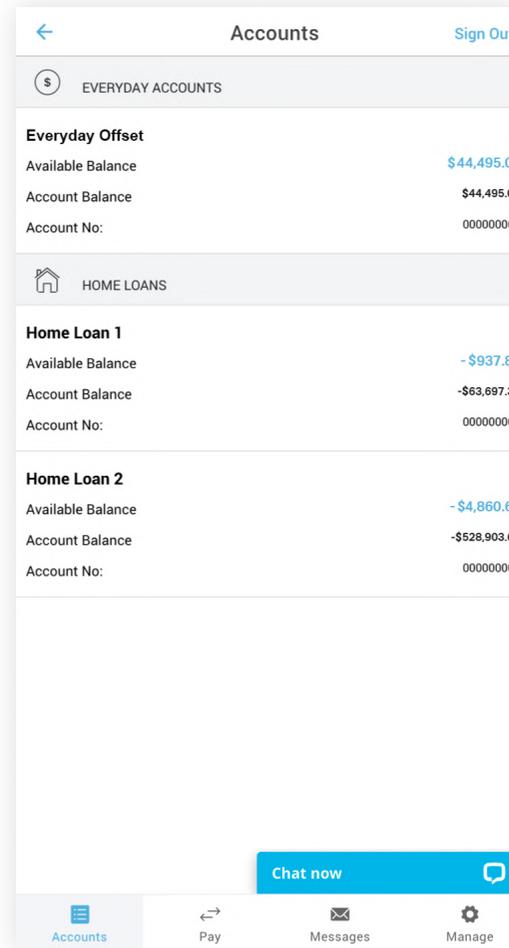
Additional options & helpful tools are available when you click the hamburger  icon.

You can also access our **Live Chat** feature in your Firstmac Money app, which allows you to quickly and securely chat with our agents about your account.



# 03 Accounts

The **Accounts** area provides a summary of all your current accounts. You can select one of the accounts to view recent transactions and relevant details, and make a quick payment as a **transfer** or **BPAY**. If you have an **offset sub-account**, you will be able to access our handy offset tracking feature in the **'Accounts'** area, where you can view your offset benefits.



# 04 Pay

In both the **Make a Payment** or **Pay** section, you can take a number of actions:

- Set up a once-off payment
- Schedule ongoing payments
- Add a new payee or biller in the "To:" area
- Change Daily Transfer Limit by clicking the link below "Amount"

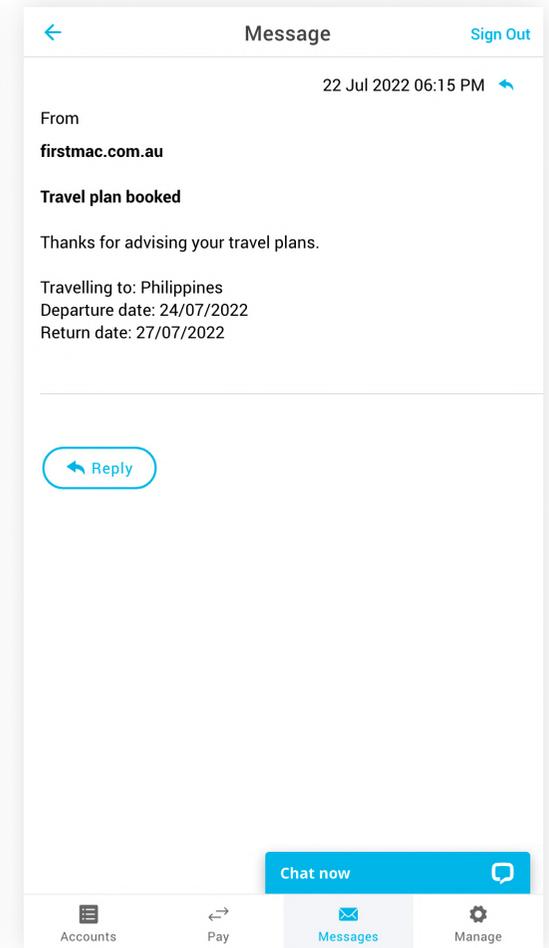
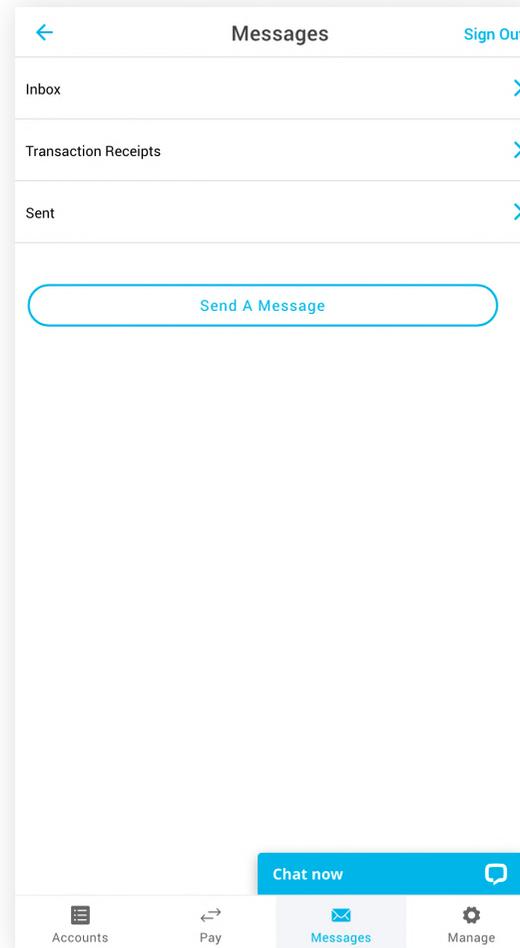
The screenshot shows the 'Make a Payment' screen in a mobile application. At the top, there is a back arrow, the title 'Make a Payment', and a 'Sign Out' link. The form contains the following fields:

- From :** Select account (with a right arrow)
- To :** Select account (with a right arrow)
- Amount :** \$0.00, with a link 'Change transfer limit' below it.
- Description :** Optional
- When:** 27/Jul/2022 (with a calendar icon)
- How often :** Once (with a right arrow)

Below the form is a large blue 'Continue' button. Underneath it is a radio button labeled 'Send receipt to my messages'. An 'IMPORTANT MESSAGE' section follows, containing a security warning: 'As a security measure prior to transferring any funds to an external third party account, we strongly recommend that you telephone the third party account holder to confirm the account details and the amount you are transferring are correct.' Below this is another warning: 'Please do not rely on email communication to update or verify third party account details. If funds are transferred, please ensure you have verified the details as far as possible to avoid any loss of funds.' A blue 'Chat now' button with a speech bubble icon is positioned over the bottom right of the message area. At the very bottom is a navigation bar with four icons: 'Accounts', 'Pay' (highlighted in blue), 'Messages', and 'Manage'.

# 05 Messages

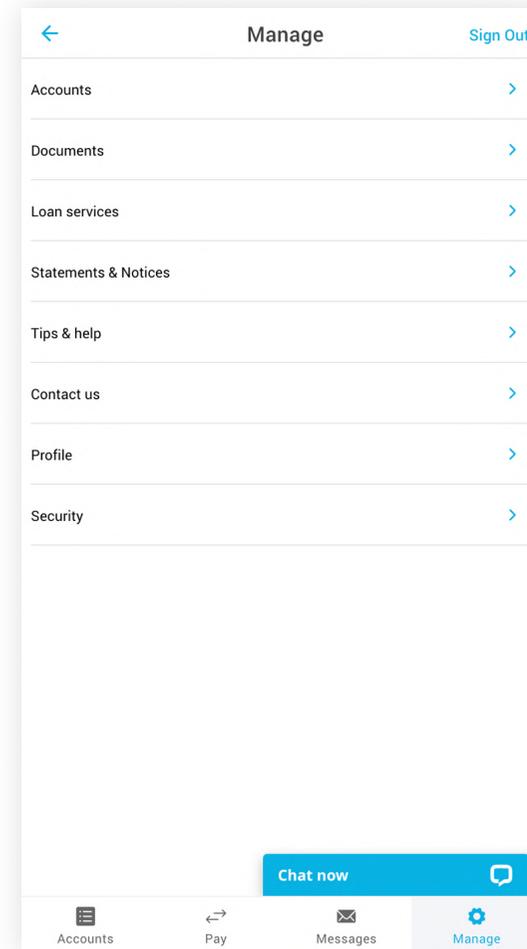
The messages section shows any important communications from Firstmac and transaction receipts. In this section, clicking **New Message** will allow you to send us a direct and secure message, to which we can respond.



# 06 Manage

The **Manage** menu provides access to the following:

- Accounts
- Documents
- Loan Services
- Statements & Notices
- Tips & Help
- Contact Us
- Profile (mobile app only)
- Security



# 07 Manage - Accounts

The following information can be found under the **Accounts section**.

## Account Details

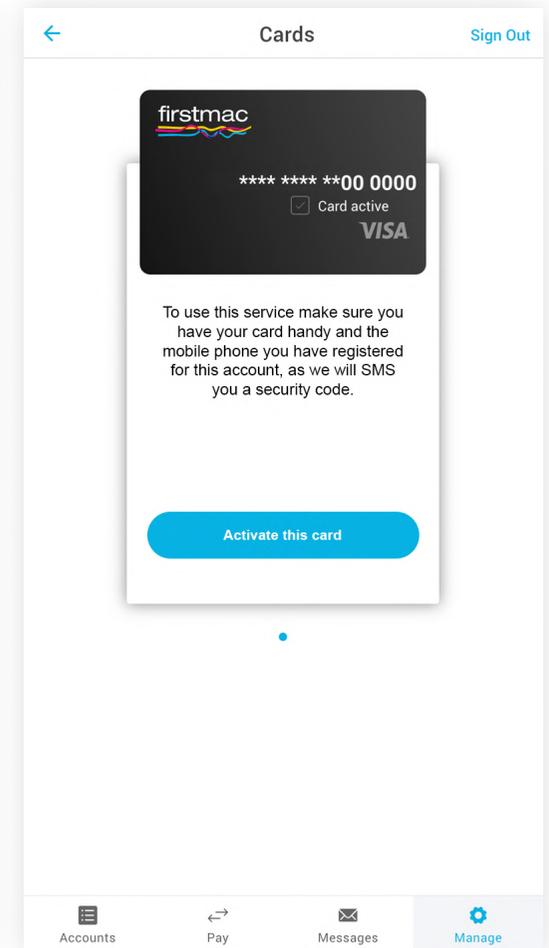
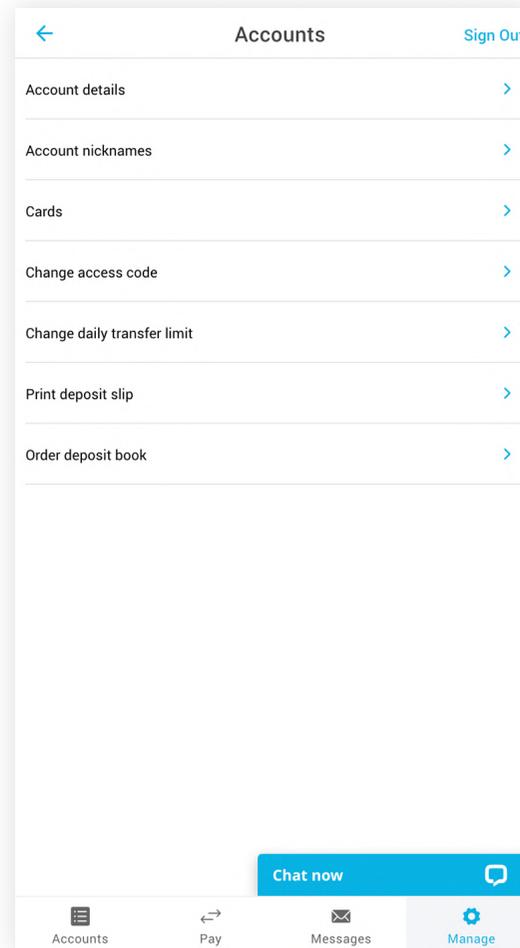
View the current rate, repayment amount and due date plus much more.

## Account nicknames

Update the account display name to be more suitable to your needs.

## Cards

Activate your new card or change your card PIN number here.



## Change Access Code

Your new password will need to meet the following requirements:

- Minimum 12 characters
- Must include a number
- Must include a special character
- Cannot include Date of Birth
- Cannot include consecutive numbers

## Change daily transfer limit

Increase or decrease your daily transfer limit. The maximum online transfer limit is \$20,000.

## Print deposit slip

Generate a deposit slip for over the counter deposits at Australia post.

## Order deposit book

Place an order for your deposit book.

← **Change Access Code** Sign Out

Current code:

New code:

Verify new code:

Your password must be at least 12 characters and include at least a lower case character, upper case character, and a number. It must not consist of consecutive number (e.g. 12345678), repeated numbers (e.g. 222222222), and must not resemble your date of birth or client number.

- ✓ Password must be between 12 and 98 characters.
- ✓ Password must contain at least one symbol.
- ✓ Password must contain at least one number.
- ✓ Password must contain at least one upper case letter.
- ✓ Password must contain at least one lower case letter.

Save

Chat now

Accounts Pay Messages Manage

# 08 Manage - Documents

## Interest Charged Letter

You can generate a letter confirming the interest charged on your loan for the previous or current financial year, for tax purposes.

## Forms

There is also a document vault available for you to upload completed forms quickly and securely.

The screenshot shows a mobile app interface for generating an interest charged letter. At the top, there is a back arrow, the title "Interest Charged Le...", and a "Sign Out" link. Below the title, there are two rows of form fields: "Account: INV PROPERTY MORTGAGE 000000000" and "Financial Year: This financial year", each with a right-pointing chevron. A note below these fields reads: "Please select the account that you require an interest charged letter for and select the financial year. Then, please print on A4 piece of paper." At the bottom of the form, there is a large blue "Generate PDF" button and a smaller blue "Chat now" button with a speech bubble icon. The bottom navigation bar contains icons for "Accounts", "Pay", "Messages", and "Manage".

The screenshot shows a mobile app interface for uploading a file. At the top, there is a back arrow, the title "Upload file", and a "Sign Out" link. Below the title, there are three rows of form fields: "Account: Home Loan 1", "Document Type: Select document type", and "Selected file: Provide file to upload", each with a right-pointing chevron. Below these fields, there is a section for "Additional information:" with the text "Provide any additional information you would like to tell us." At the bottom of the form, there is a large light blue "Upload File" button and a smaller blue "Chat now" button with a speech bubble icon. The bottom navigation bar contains icons for "Accounts", "Pay", "Messages", and "Manage".

## 09 Manage - Loan Services

The following requests can be done under the **Loan Services section**.

### **Edit direct debit details**

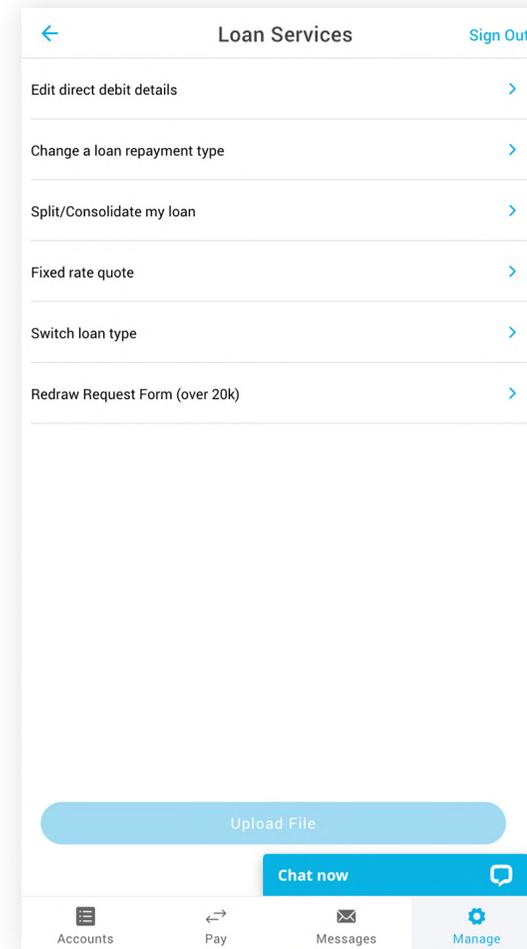
Add or edit your direct debit details.

### **Change loan repayment type**

Request to change your change loan repayment type.

### **Split/consolidate loan**

Request to split/consolidate your loan



## Request fixed rate quote

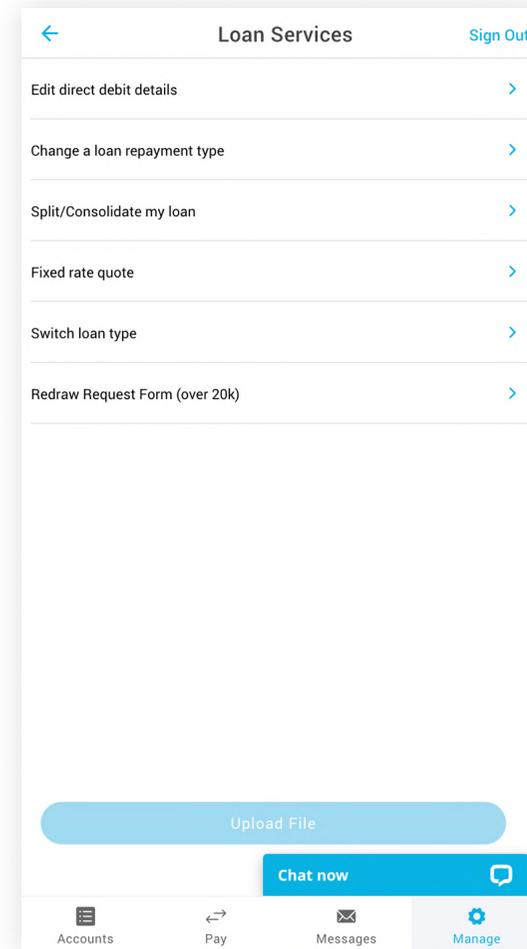
Request a fixed rate quote based on the selected fixed term.

## Switch loan type

Request to switch loan type

## Redraw Request Form (over \$20k)

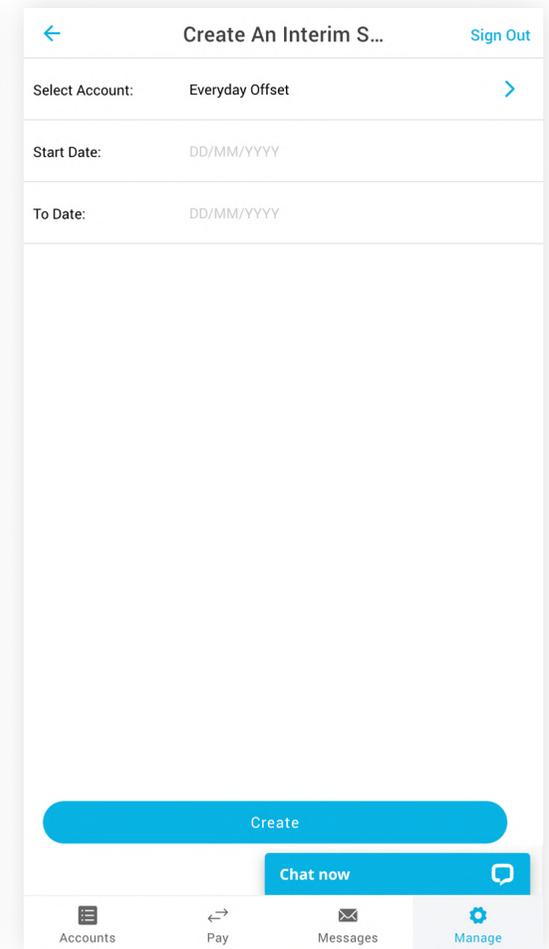
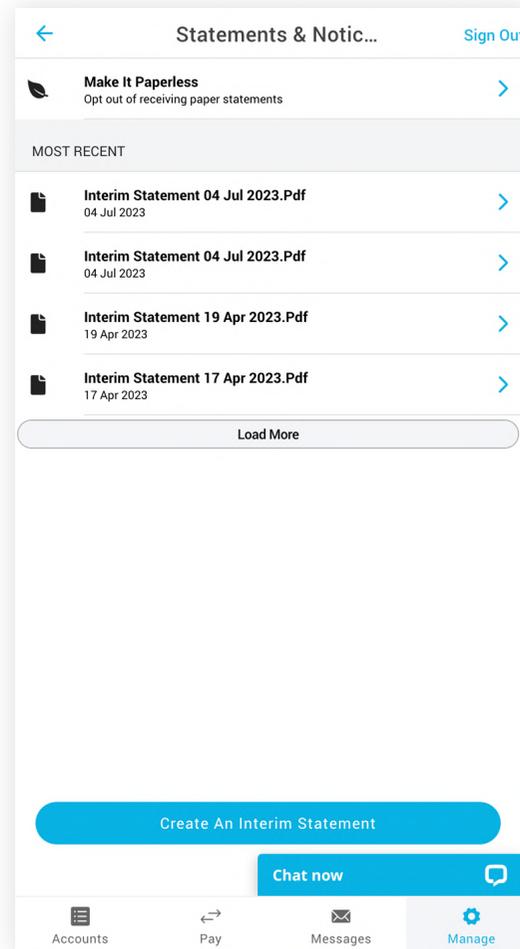
Request for a redraw for over \$20,000.



# 10 Manage - Statements & Notices

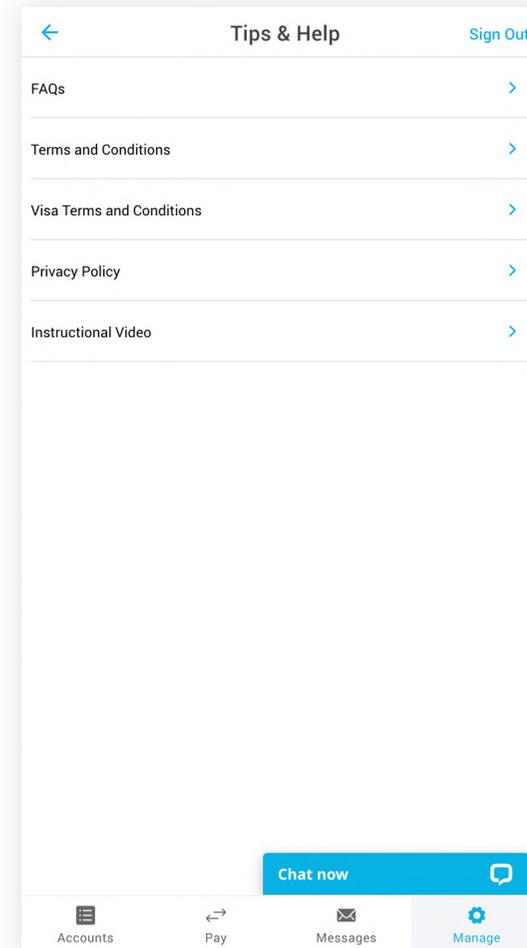
View your most recent **Statements** and correspondence regarding your Account.

You can also go green and **opt out of receiving paper statements.**



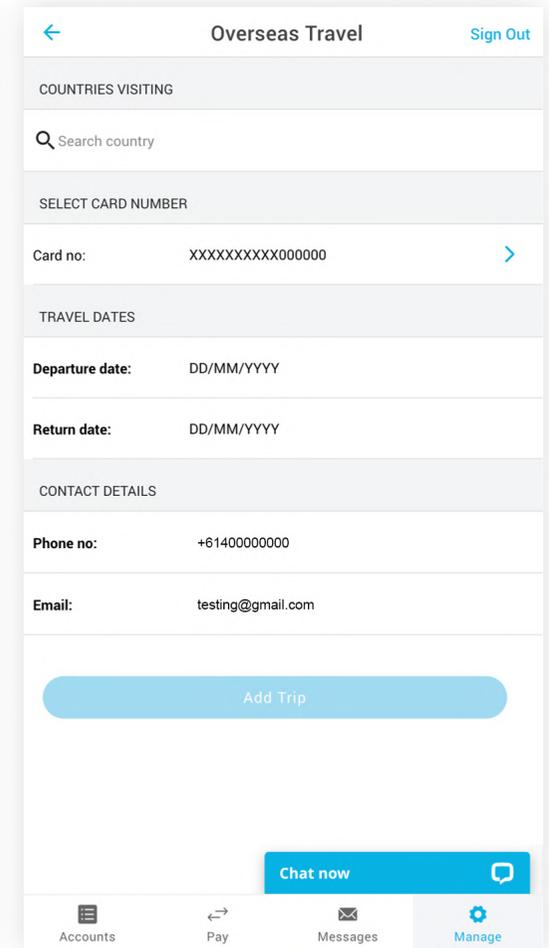
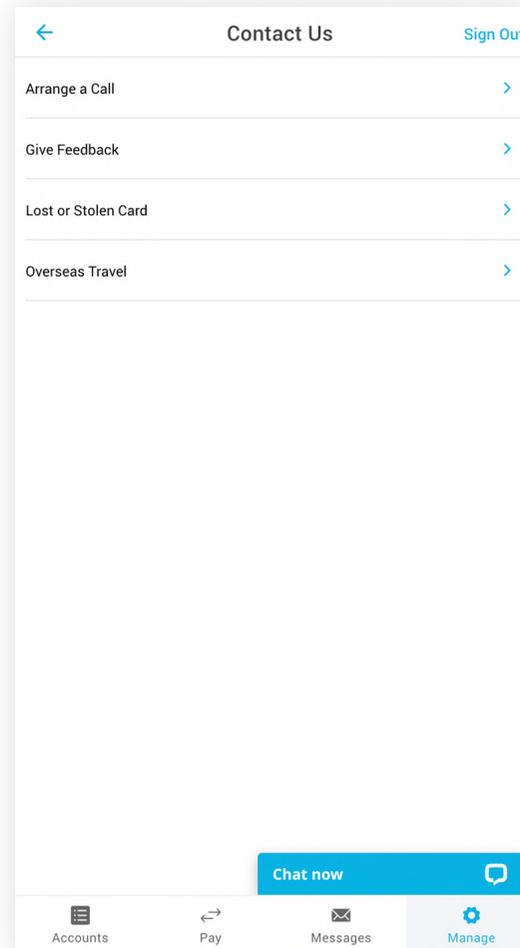
# 11 Manage - Tips & Help

View FAQs, Firstmac Money Terms and Conditions, Visa Terms and Conditions, Privacy Policy, and an Instructional Video how to use Firstmac Money.



## 12 Manage - Contact Us

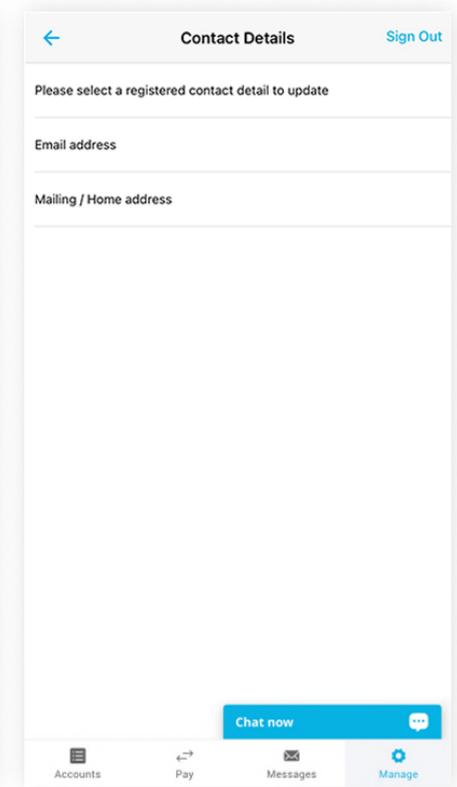
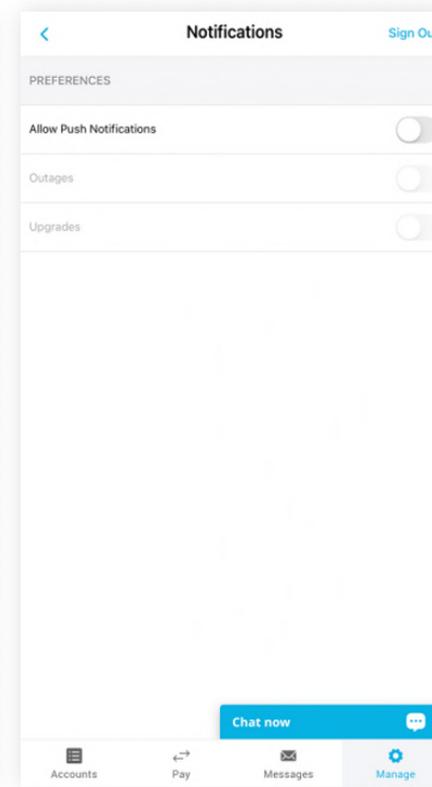
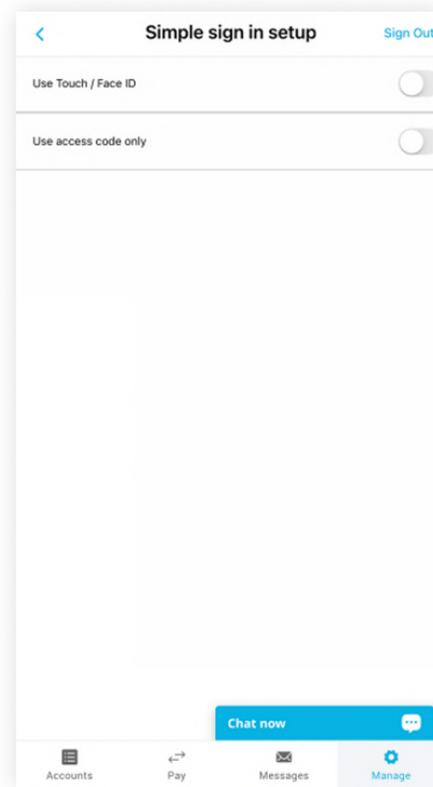
You can arrange a call, give feedback, and if your card is lost or stolen call us using the phone numbers in Contact Us. You can also notify us whenever you travel overseas.



# 13 Manage - Profile

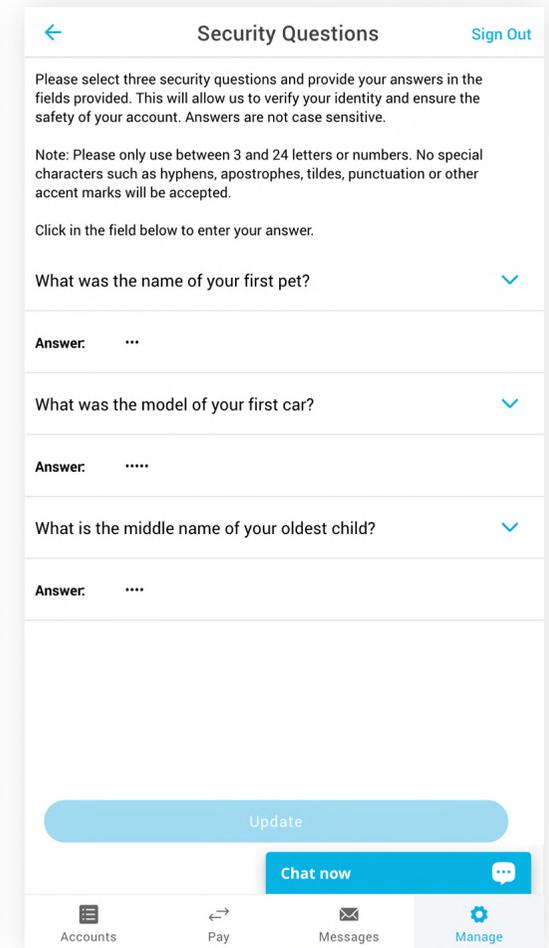
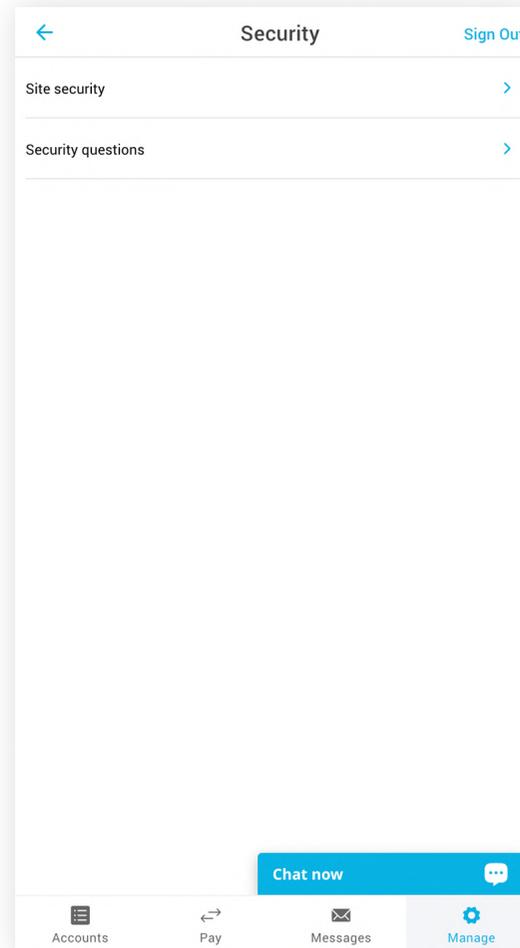
Choose your preferred **sign in settings** for Touch and Face ID and manage notifications from Firstmac Money in the **notification settings**. These features are available in the iOS and Android mobile app versions only.

You can also update your personal information under **Contact Details**.



# 14 Manage - Security

View information on our site security or provide additional security questions to be answered for inquiries to the online services team.



If you have any questions about getting set up or using our **Firstmac Money Online Services**, get in touch with us via **Live Chat, Facebook** or by calling **13 12 20**.



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