

How to attach or end an Authorised Credit Representative (ACR) association to a financial firm (FF) or add a licensee to an ACR

You can update your associations (for both a licensee or an ACR) in the member portal. You can add, amend (update the association end date) and end an association. Once you complete the action in the member portal, the other party will receive a notification.

- 1. Log in to the portal
- 2. Click Membership details
- Click Associations 3.
- 4. Select the member association you wish to amend
- 5. Click the down arrow for the option to End Today or Enter End Date

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Dashboard	Financial Complaints	Service Complaints								
	#1297 Joe Smith / M	embership details								

ACR

Dashboard Financial Complaints Service Complaints SARM Cases Membership Requests Invoices Benchmark reporting Membership details Contacts Certificates	
#1297 Joe Smith / Membership details	
Membership details	
Details Associations Cancel Membership	
Associated Licensees	
Search Q Add	
Related Account ↑ Related Account No. Start Date End Date Status	
ABC Bank 1393 12/01/2024 12/01/2024 Inactive	
Bank Bank 1105 11/10/2023 Active	
Enter Er End Toc	nd Date day

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Financial Firm

Financial Complaints	Service Complaints	SARM Cases M	embership Requests	Invoices	Benchmark reportin	g Mer	mbership details	Contacts	Certificat	es	
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1. After clicking Enter End Date, this box will appear

Account Required							
ABC Bank							
Related ACR's Required							
ACR No 4. Pty Ltd					×		۹
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26/02/2024							
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- 1. Add in your end date as the current date or a future date to cease the relationship
- 2. If you click **End Today**, the status will change to **Inactive** and the end date will populate overnight

1	Membership details											
D	etails Associations Cancel Me	mbership										
A	ssociated Licensees				Search	٩	Add					
	Related Account 🕇	Related Account No.	Start Date	End Date	Status							
	ABC Bank	1393	12/01/2024	12/01/2024	Inactive		~					
	The Bank	1105	11/10/2023		Active		~					

If you add an ACR/Financial Firm in error, make a general request or email <u>membership@afca.org.au</u> to amend the records. You will not be able to delete an ACR or licensee in the portal.