

for Adviser use only

BRAND CUSTOMISATION GUIDE

INTRODUCTION

The platform offers a range of flexible branding options as standard, which can be implemented by the GrowthInvest client services team as part of the initial set up process, or managed by an internal team as appropriate. The standard branding functionality give our intermediary clients the flexibility to incorporate and define exact brand colours, imagery, logos, and even favicons and avatars for intermediary users and clients alike. More details and technical requirements are included below, and we are always very happy to discuss any specific branding or technical requirements you may have.

Navigation: Settings > Branding

You can find the Branding section by clicking on your name in the top right of any screen on the Platform. From there you can select “Settings” from the dropdown menu.

From the Settings screen simply select the “Branding” tab.

Branding Overview

From the **Settings > Branding** view you can see any changes that have been made to customise your Platform. Additional permissions may be required to actually change these settings.

The individual customisation options include:

Colours

Use the colour selector or set a specific colour code to match or complement your corporate colour scheme quickly and easily with these core settings.

Logo

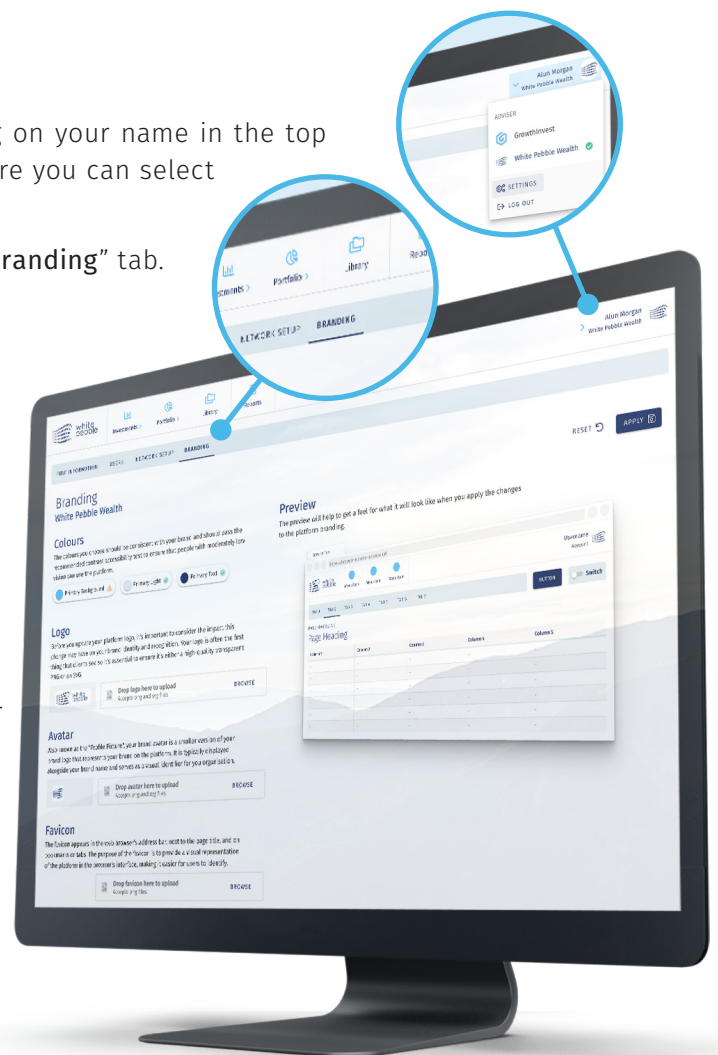
Upload your company logo in PNG or SVG file format to stamp your brand on the Platform.

Avatar

You can also add a smaller profile image (also PNG / SVG file format) that will appear throughout the Platform.

Favicon

Keep your branding consistent to a fine level of detail with a tiny Favicon version of your branding, to appear in the web browser address bar, as well as bookmarks and tabs.



Preview

If you are able to make any changes, you can see how they will look before committing to them, using the **Preview** section on the right hand side. This shows a dynamic browser illustration that will respond to the changes made. You can click **RESET** to remove any current changes, or click **APPLY** to save and apply the changes to the entire Platform.

ADDITIONAL HINTS & TIPS

- Only intermediary Super Users will be able to use and adjust the branding page. Please get in touch with your internal GrowthInvest main contact if you need access to this functionality.
- Please be sure to use the “preview” area to test any changes you have made in advance of applying across the platform.
- We advise that any changes to branding are done out of standard working hours to avoid any confusion or concern amongst any intermediary or client users who may be using the portal at the time.
- If branding changes are being made after initial access has been provided, please be sure to inform all clients and staff.
- If you need any help with any aspect of the company branding, including colour matching, please do not hesitate to contact us to ask.

SUPPORT

If you have any questions, please do not hesitate to contact the GrowthInvest Client Services team **via the portal**, by email at **clientservices@growthinvest.com** or call us on **0300 303 0037**.



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