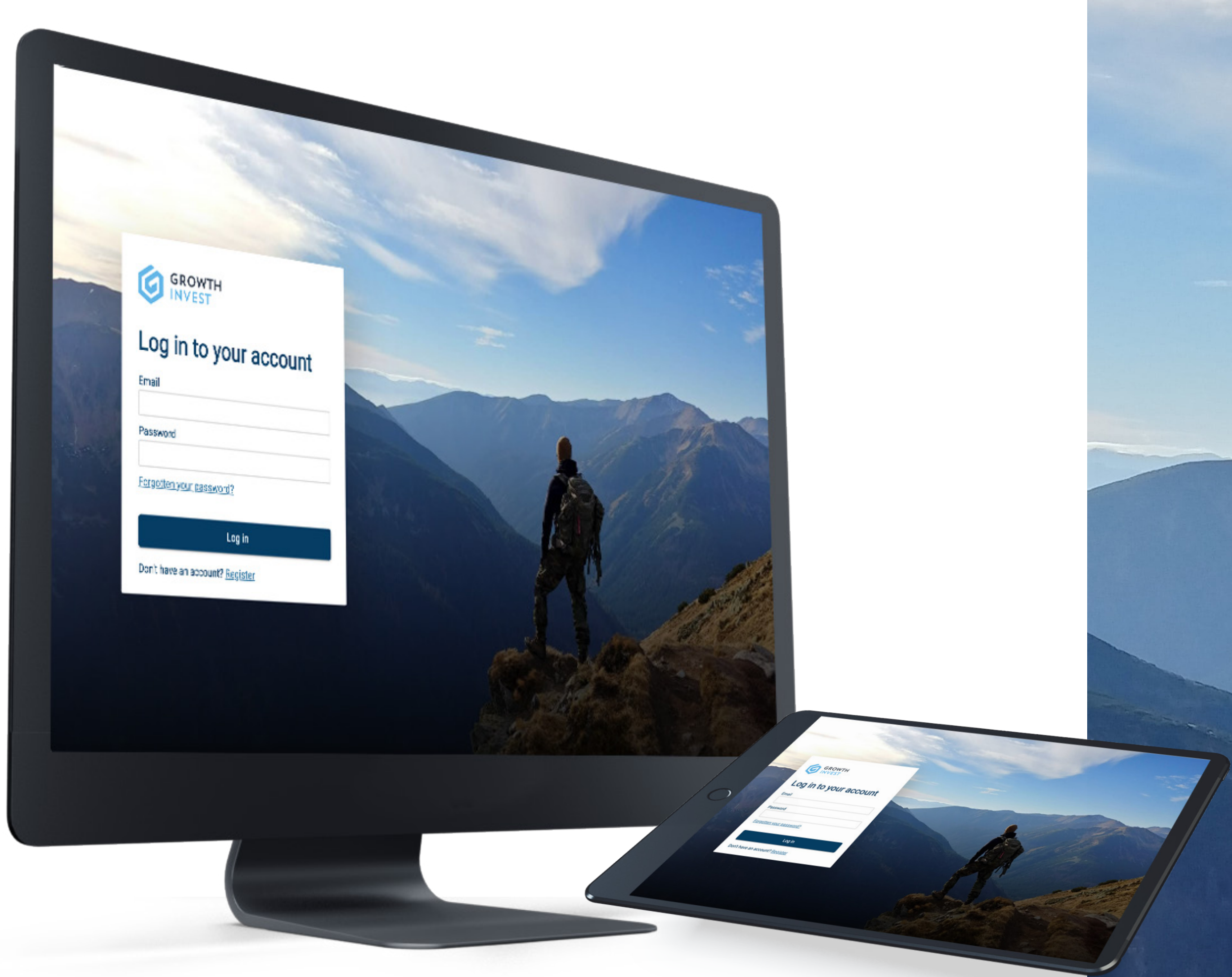
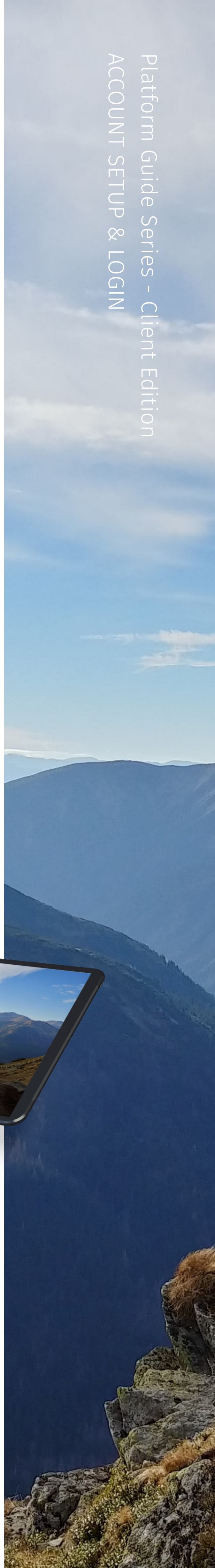
GROWTH INVEST



Platform Guide Series - Client Edition

ACCOUNT SETUP & LOGIN


Platform Guide Series - Client Edition
ACCOUNT SETUP & LOGIN

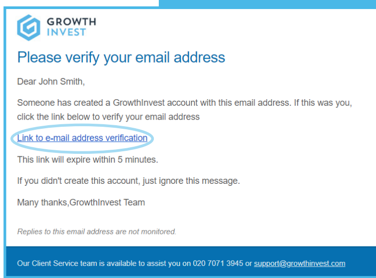
GROWTH INVEST

ACCOUNT SETUP & LOGIN

This guide is intended for existing GrowthInvest clients, and will provide you with an initial look at the new GrowthInvest portal, and walk you through the steps required to finish setting up your new account access, as well as providing an overview of what you can expect to see when you login for the first time.

As you already have a GrowthInvest account, you simply need to set up your account access and security, including multi-factor authentication. You will then have full access to your account(s) and review your investment portfolio, obtain up-to-date valuations, check out new investment opportunities, and much more.

1 ACCESSING GROWTHINVEST



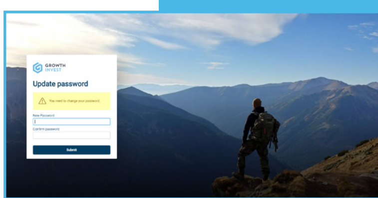
Before logging into the new portal for the first time, you will be asked to verify your email address. An email will be sent to the address linked to your existing account, which will ask you to click a link to verify the email address. This process will only need to be completed once.

Once you receive the email, please click the verification link, which will take you through to a browser.

Please note that for security reasons the link will expire **within 24 hours**. If the link has expired simply click the “Forgotten password” link on the login page to restart the process, or contact us on clientservices@growthinvest.com to request a new link.

If you cannot see the verification email, please check your junk or spam mailboxes. Our team are always happy to help if you require any help with account verification or login.

2 SETTING UP A SECURE PASSWORD



At this point you will be asked to set up a password for your account. As with all passwords, we recommend you choose a secure password. The password should be at least 8 characters, with a mixture of lower and upper case letters, number and symbols.

MORE...

3 MULTI-FACTOR AUTHENTICATION (MFA)

The GrowthInvest portal now offers the option for client accounts to have the additional security of Multi-Factor Authentication (MFA) to be enabled. If your financial intermediary has asked for this to be put in place across all client accounts, you will need to go through some additional steps to set this up.

If enabled, a multi-factor authentication ("MFA") code is required each time you login. This ensures that you are the only person who is able to access your account. However, first of all your account needs to be linked to an MFA application (an "app") on your mobile device, which can be either a phone or tablet.

BEFORE YOU START

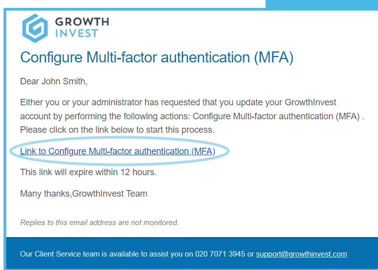
If you do not already have an MFA app on your mobile device, you will need to download one from your app store before linking it up with the GrowthInvest portal.

There are a number of MFA applications that can be downloaded from your app store. Please see below a list of available apps, any of which will work with the GrowthInvest Platform:

- FreeOTP
- Google Authenticator
- Microsoft Authenticator

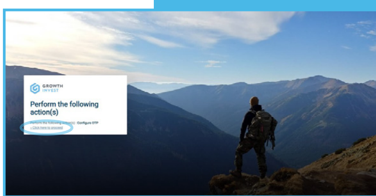
Step 1: Click MFA Email Link

You will receive an email from GrowthInvest, containing a link to the authentication steps and QR code. When you receive this, click the available link, which will open a page on your browser.



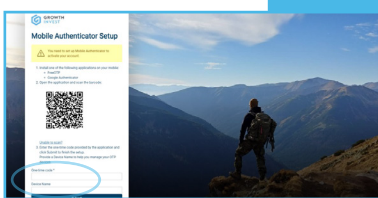
Step 2: Open Browser

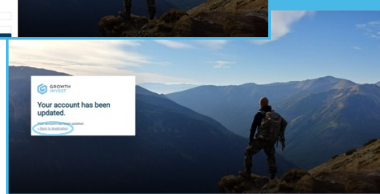
Once the page is open, please click the available link to move through to the authentication page. Outlined here is a list of instructions and a QR code which the authentication application will ask you to scan. (Please note, if you try to scan this QR code with your phone's camera the authentication will not work, so please only scan the code when the app requests it.)



Step 3: Create GrowthInvest MFA account

Within your chosen app, create a GrowthInvest account and follow the relevant instructions until you are instructed to scan a QR code. Once scanned from your browser, the app will provide you with a passcode. Enter this code and the name of your devices in the text boxes available on the browser and click submit.





MORE...

Step 4: Enter Login Code

You will receive a pop-up saying your account has been updated. Return to the login page and enter your username and password details. Once you've pressed submit, you'll be asked for an authentication code. Open your authenticator app and request a secure login code.

NOTES ON MFA APPS

Depending on the chosen authenticator app, the way to do this may differ slightly, however, once the authentication app has been linked to your GrowthInvest account, you will see the GrowthInvest option.

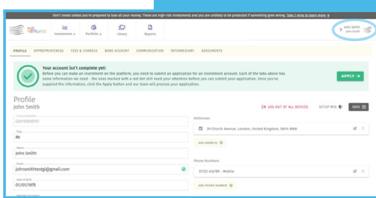
By clicking the relevant account, the app will generate and display a passcode. Enter this into the page of your browser and press submit. Your browser will then launch the GrowthInvest platform, and you will be logged in to your account.

IMPORTANT

It is important to note that an authentication code from your chosen app will be required each time you login to the GrowthInvest platform, so please do not uninstall this app. If you experience any issues with completing the MFA or linking your account, please do contact our client services team.

4 NAVIGATING THE PLATFORM

After completing the account set up process for the first time you will land in the Profile section of the platform. In this section you are able to review your personal information which has been added by your adviser and adjust your notification preferences to fit your requirements. To return to this section in the future, simply click on your name in the top right-hand corner and select Settings.

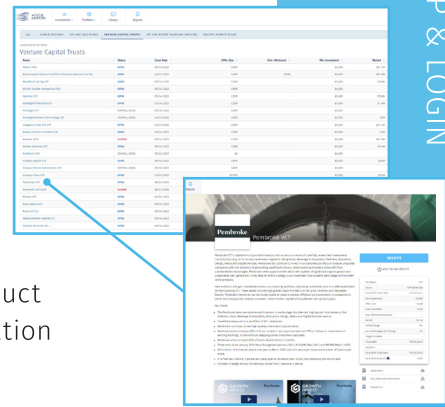


For a full introduction to the GrowthInvest platform, please see our user guide: **GrowthInvest Platform – An Introduction for Clients**. Included below is a brief summary of the main areas of the client portal:

GROWTH INVEST

Section 1 – Investments

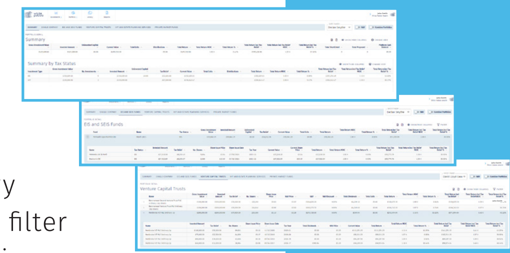
The investments tab offers a view on all offers available for investments, along with access to Shortlists created by your adviser or yourself, and a view on current applications within the Proposals section.



The Offers section allows you to view all of the offers available to you. For more information on an individual investment, simply click in to open a more detailed product page which includes all the Offer details, full documentation suite, as well as videos news and more.

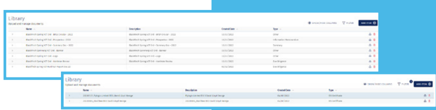
Section 2 – Portfolio

The Portfolio tab offers a high-level view of your investments, along with a more detailed view of each holding, plus information on your transaction history.
This includes a high level Dashboard, a portfolio summary view, as well as the Portfolio Detail, a more detailed area for each investment and investment type, that allows you to drill down and analyse each and every investment. The Transactions area allows you to review, filter and analyse all related transactions across your portfolio.



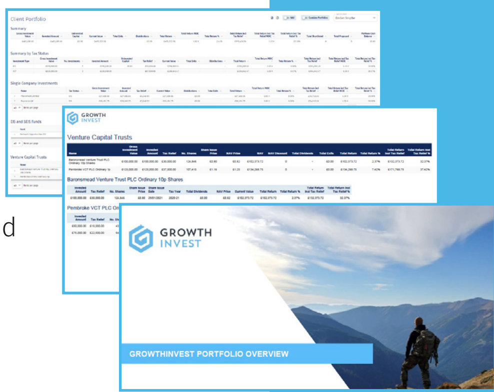
Section 3 – Library

The Library tab allows you to access all documentation that relates to your account, your holdings and investments; such as tax certificates, portfolio updates and other key information documents. Additionally, you will also have access to marketing documentation that relate to available offers and products.



Section 4 – Reports

The GrowthInvest platform offers a range of reports and exports that can be downloaded in multiple places across the platform. We continue to add and expand our range of client reports. The most commonly used is our Client Portfolio report, which shows a detailed view of your holdings and transaction history and can be downloaded as a PDF or excel spreadsheet.



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.**

GROWTH INVEST

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