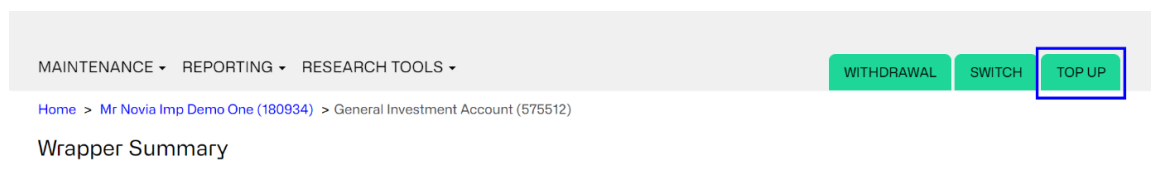


How to complete a top-up

- 1 From the Adviser Zone homepage, search for the investor using their name, investor number, or wrapper ID and press 'view.'
- 2 On the investor summary page, select the product wrapper you want to top-up, then select 'top-up' from the tabs in the top right.



- 3 You'll now see the steps to complete the top-up on the left-hand side. Some steps will show as completed as this information was entered when the wrapper was created.
- 4 Under step two, select the investment type and enter the amount to be invested.

- 5 Enter the details of the investment, adding any additional investments under the same type if needed.
- 6 Select and enter any initial adviser charges.



- 7 Proceed through the remaining steps to select the investment strategy and access documents.
- 8 Once you've finished, press 'submit' to go to the online declaration and 'proceed' to agree.

Documents

PRE-SALES ILLUSTRATION

CLIENT REPORT

GIA APPLICATION SUMMARY

PAYMENT INSTRUCTIONS

BACK

SUBMIT

SAVE

- 9 You can check progress in the notification centre section of the investor summary screen.

If you require this document in an alternative format please contact us.

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