

Getting started with Registry Direct

How to set up your account, check your holding balance, update your personal details, view statements and more.



Contents

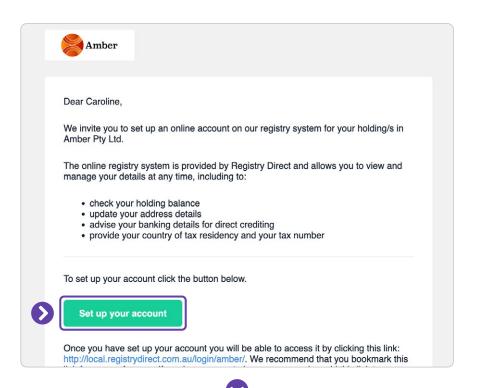
Set up your account	3
Log in to your account	6
Check your holding balance	7
Update your email address or password	8
Update your mobile phone number	9
View the details of a holding	10
Update your address details	11
Add your accountant or financial adviser	12
Advise your banking details for direct crediting	13
Provide your country of residency and your Tax File Number	14
Generate holding statements	15
Access your payment summaries	16

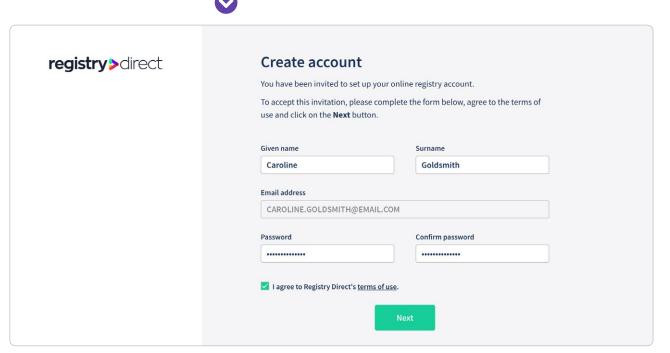


Set up your account

Once you've received an invitation in the post or in your email inbox, click the **Set up your account** button.

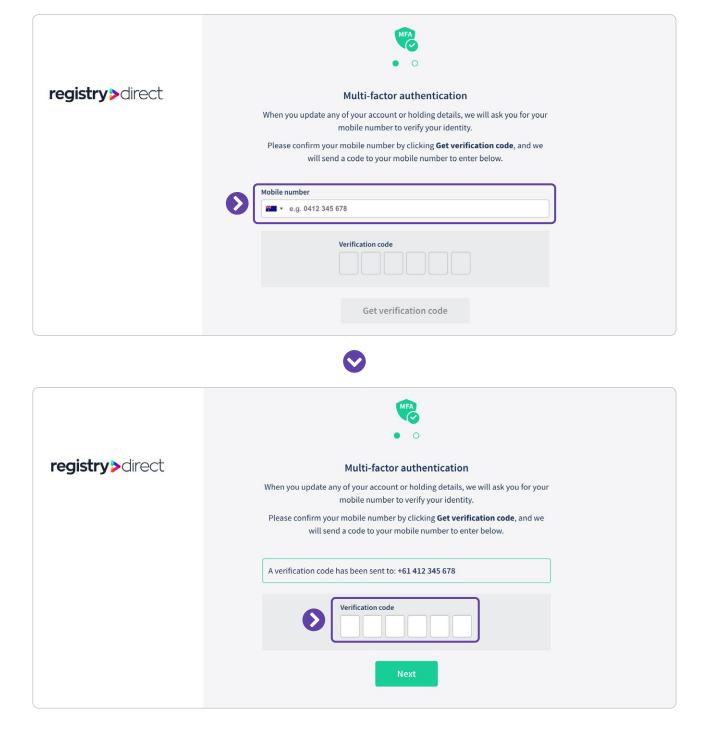
This will take you to the 'Create account' page, where you can enter your name, and create a password. Click Next.





For the security of your account, we ask for your mobile phone number. Enter your mobile phone number, then click **Get verification code**.

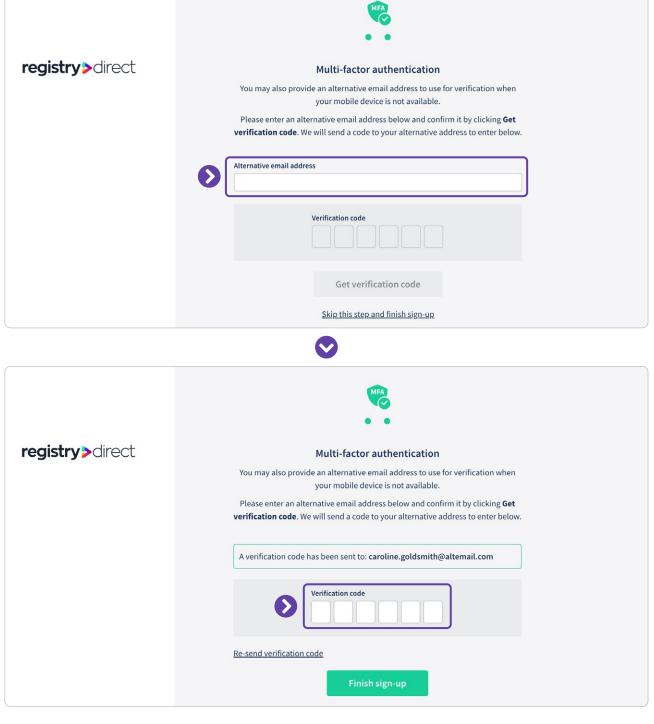
A verification code will be sent to your mobile phone. Enter the verification code, then click **Next**.



You may also provide an alternative email address. Enter your alternative email address, then click **Get verification code**.

A verification code will be sent to your alternative email address. Enter the verification code, then click **Finish sign-up**.

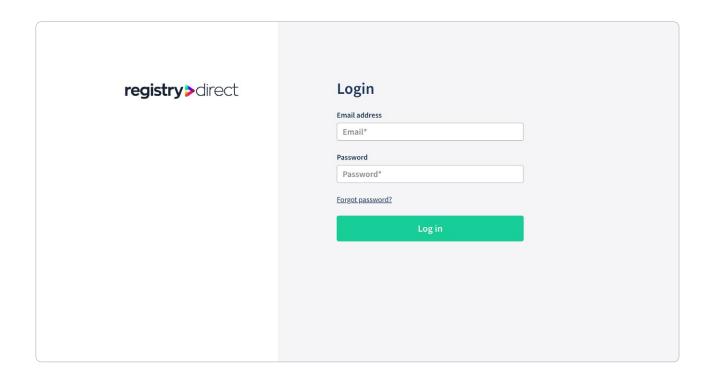
If you do not wish to enter an alternative email address at this stage, click **Skip this step and sign up**.





Log in to your account

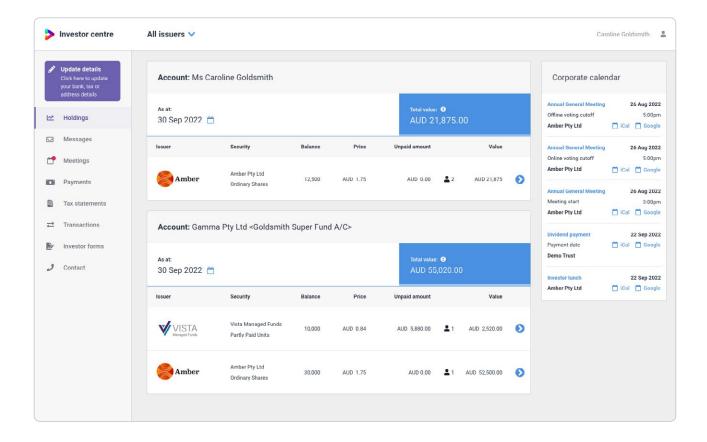
When you have created your account, you can log in by going to www.registrydirect.com/login/





Check your holding balance

Holdings information is available on the Investor centre home page.

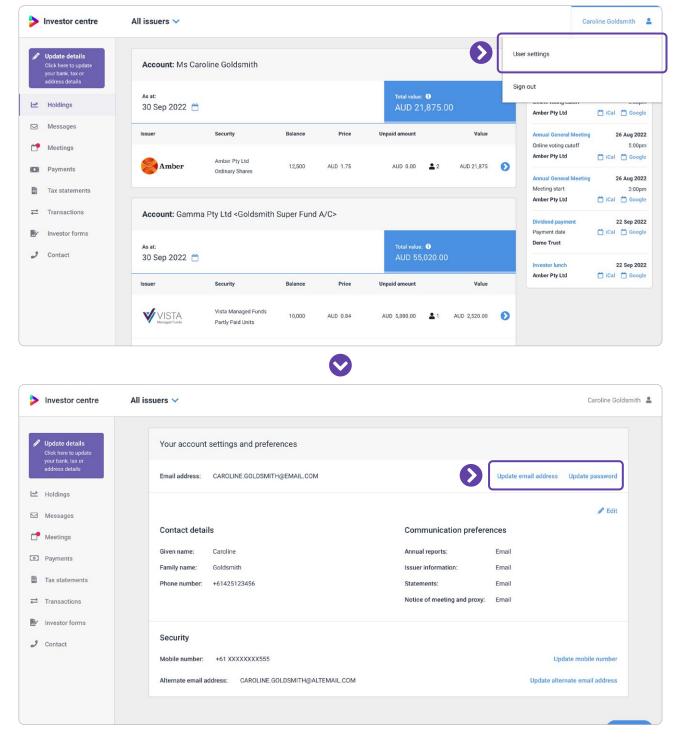




Update your email address or password

To update the email address or password you use to log in with, click on your user name in the top right corner, and then click **User settings**.

On the 'Your account settings and preferences' page, click **Update email** address or **Update password**.



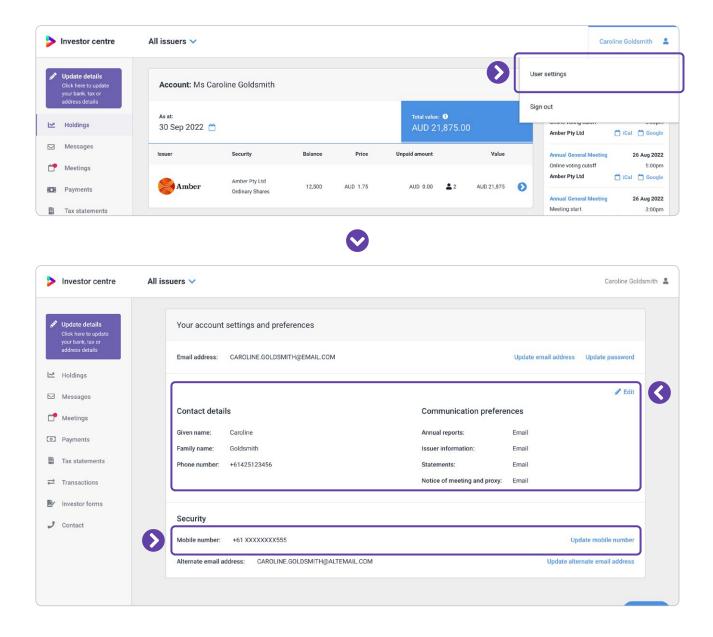


Update your mobile phone number

Click on your user name in the top right corner, and then click **User settings**.

To update the mobile phone number you would like to be contacted on, click Edit next to 'Contact details'.

To update the mobile phone number which we send verification codes to, click Update mobile number under 'Security'.

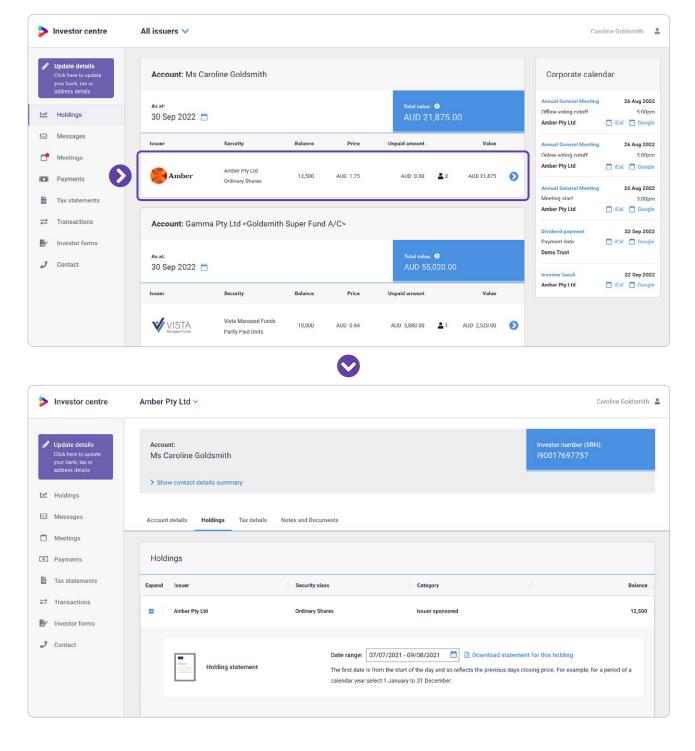




View the details of a holding

Holdings are grouped by investor. Each investor has their own page where you can specify the address, bank account details for direct crediting, and tax information for that investor.

From the home page, click on a holding to view and edit holding details.

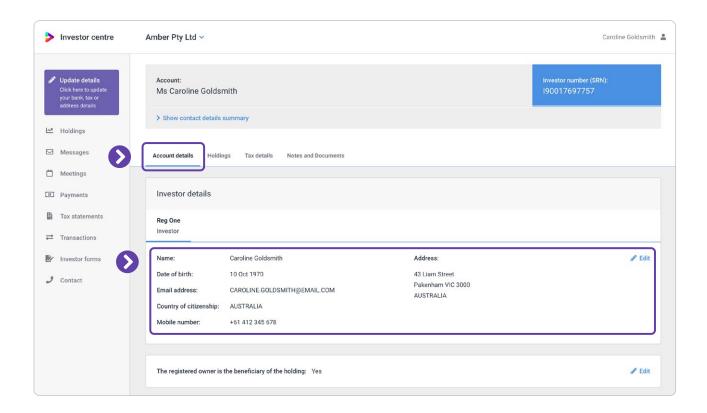




Update your address details

The platform allows you to have a different address for each of your investors.

From the home page, click on a holding belonging to the investor. Go to the **Account details** tab, then click **Edit** next to the address.

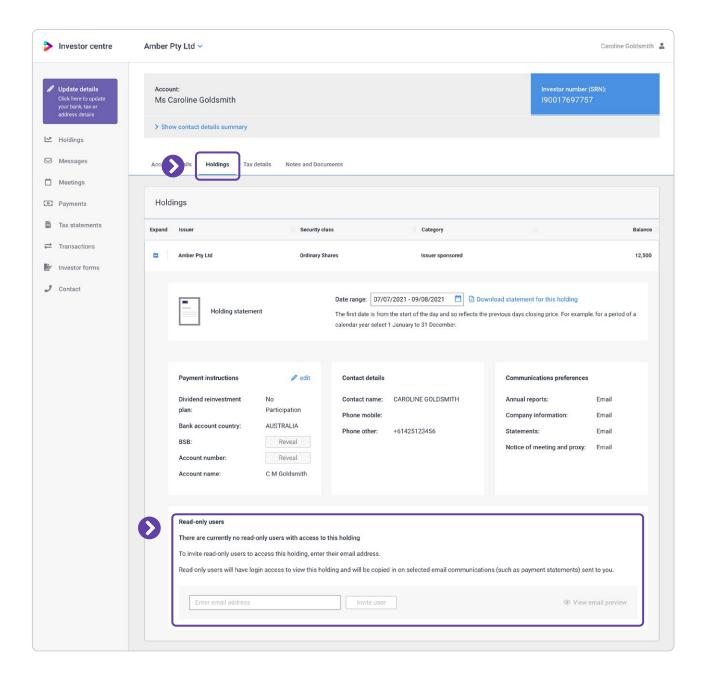




Add your accountant or financial adviser

The platform allows you to add one or more read-only users, such as an accountant or adviser, to each holding. Read-only users will also be copied in to selected communications sent to you.

From the home page, click on the holding. Under Read-only users, enter an email address and click **Invite user**.

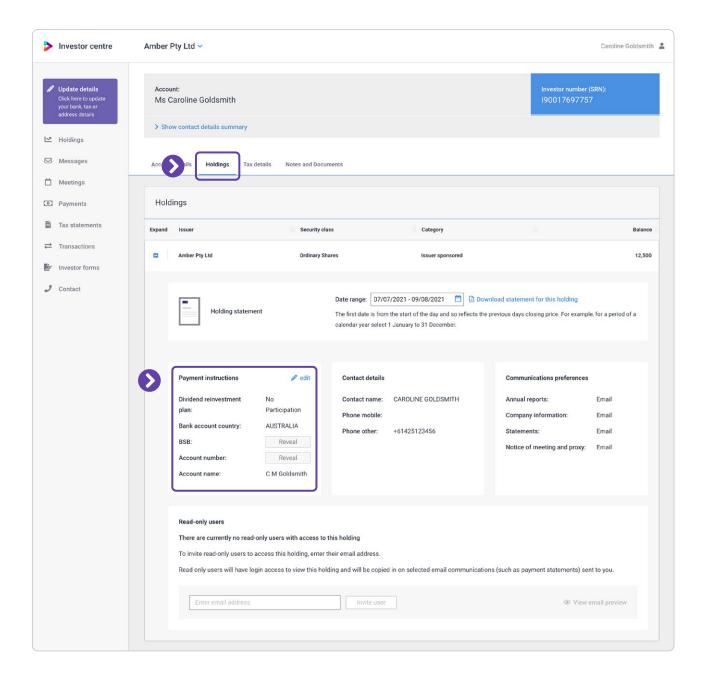




Advise your banking details for direct crediting

The platform allows you to have different bank details for direct crediting for each of your holdings.

From the home page, click on the holding. Click edit in the 'Payment instructions' section.

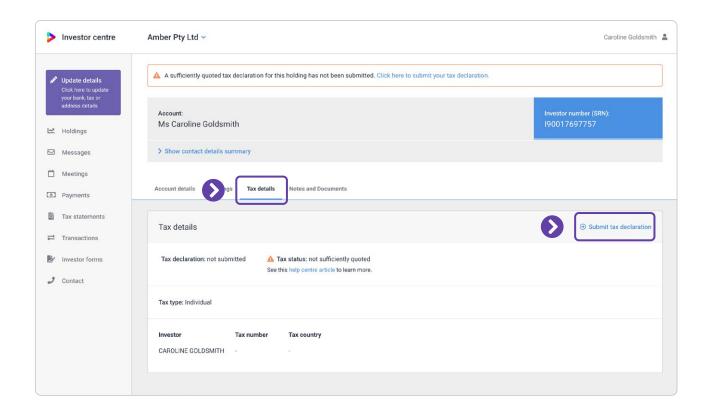




Provide your country of residency and your **Tax File Number**

The platform allows you to have different tax details for each of your investors.

From the home page, click on a holding belonging to the investor. Go to the Tax details tab, then click Submit/Update tax declaration.

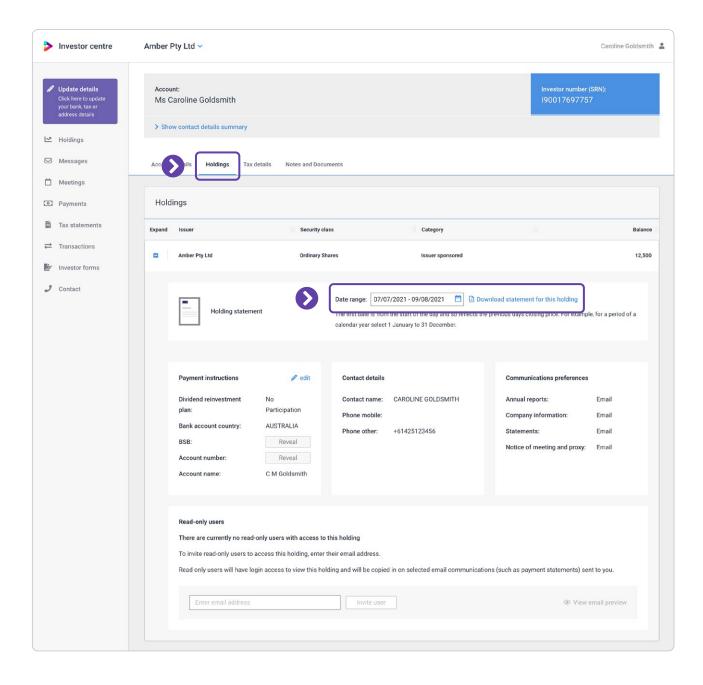




Generate holding statements

You can generate a holding statement for any period for any of your holdings.

From the home page, click on the holding. Select your date range and then click **Download statement for this holding**. If the investor has more than one holding, you can choose to include all holdings in the statement.

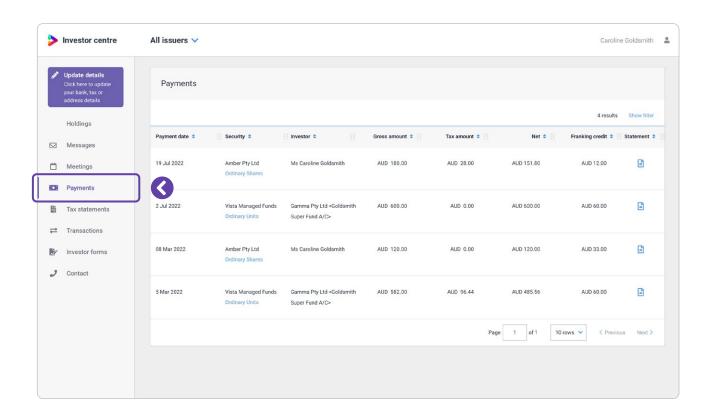




Access your payment summaries

If you have been issued a dividend or distribution payment for one of your holdings, you will receive an email with your payment statement.

You can also access your payment statements from the Payments page at any time.



For more instructions on how to use Registry Direct:

Visit help.registrydirect.com.au

