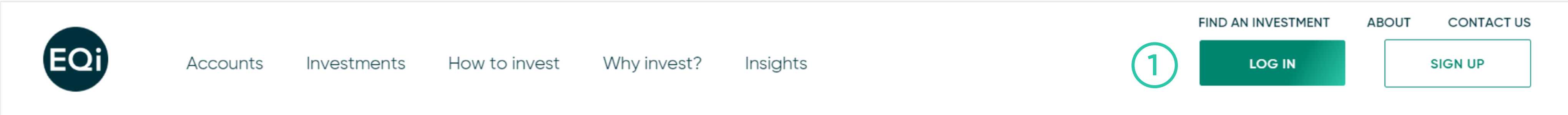
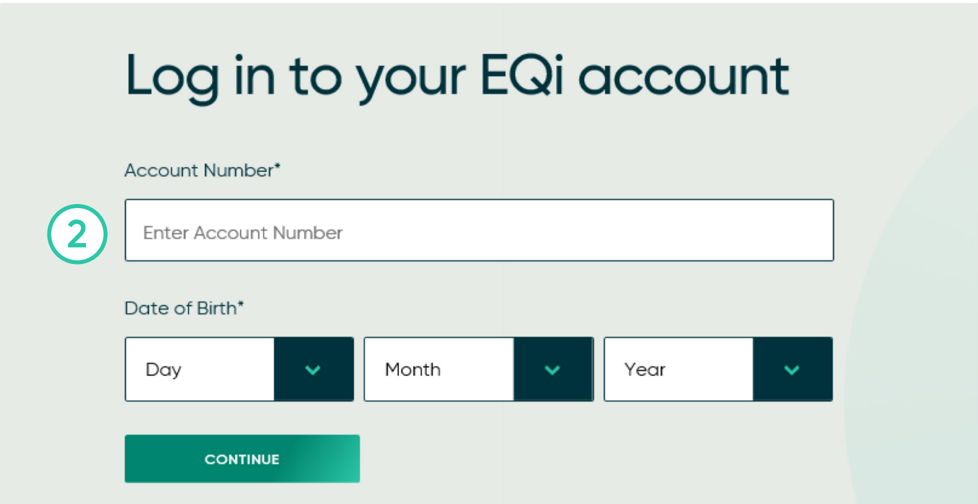
Guide to using your EQi account dashboard

How to log in

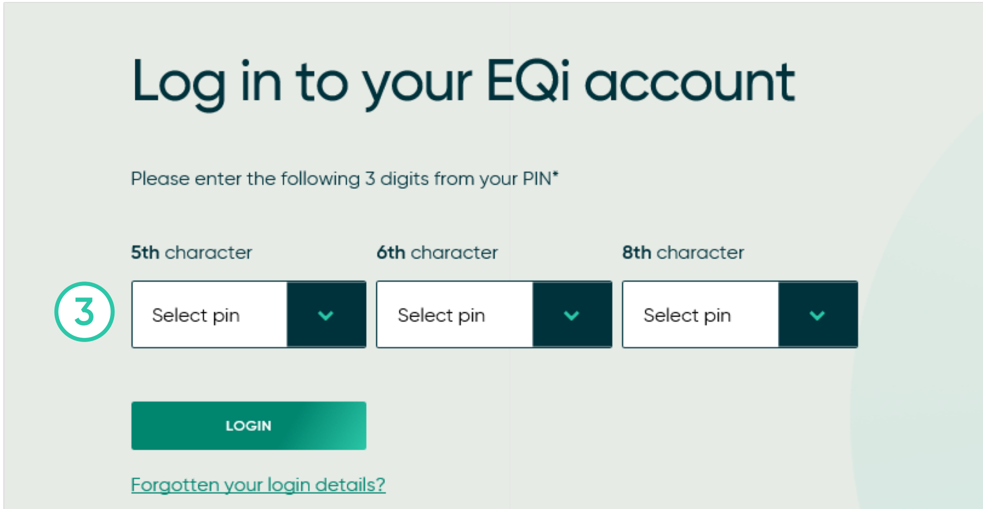
1. You will find the log in button in the top right hand corner of every web page, select 'log in' to go to the next screen.



2. On the log in page, enter your account number and date of birth.



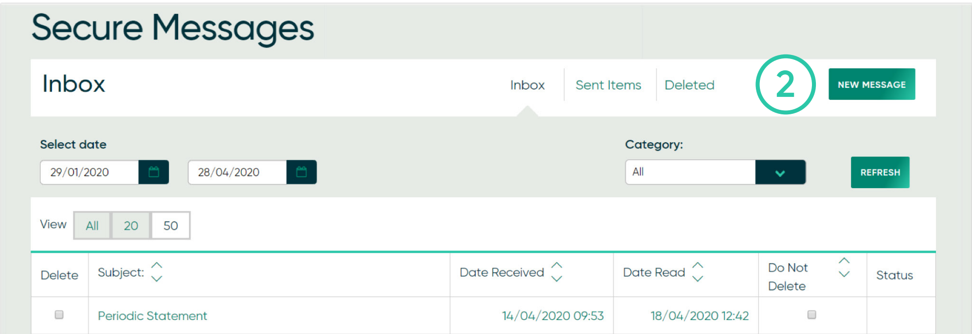
3. Finally, enter the selected numbers from your PIN.



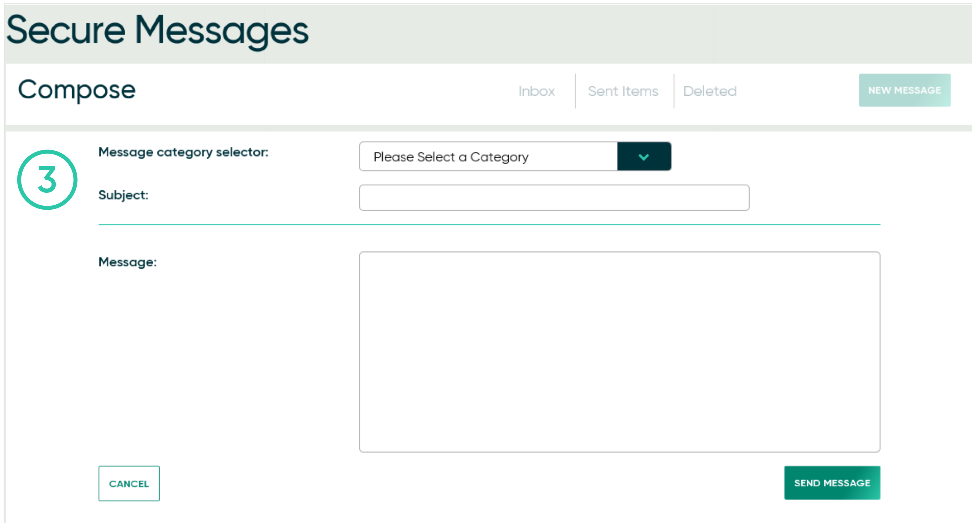
How to view and send secure messages

1. Once you log in to your account, on your dashboard select ‘inbox’ in the top right corner to view your secure messages.

2. To send us a secure message select ‘new message’ from the top right corner.

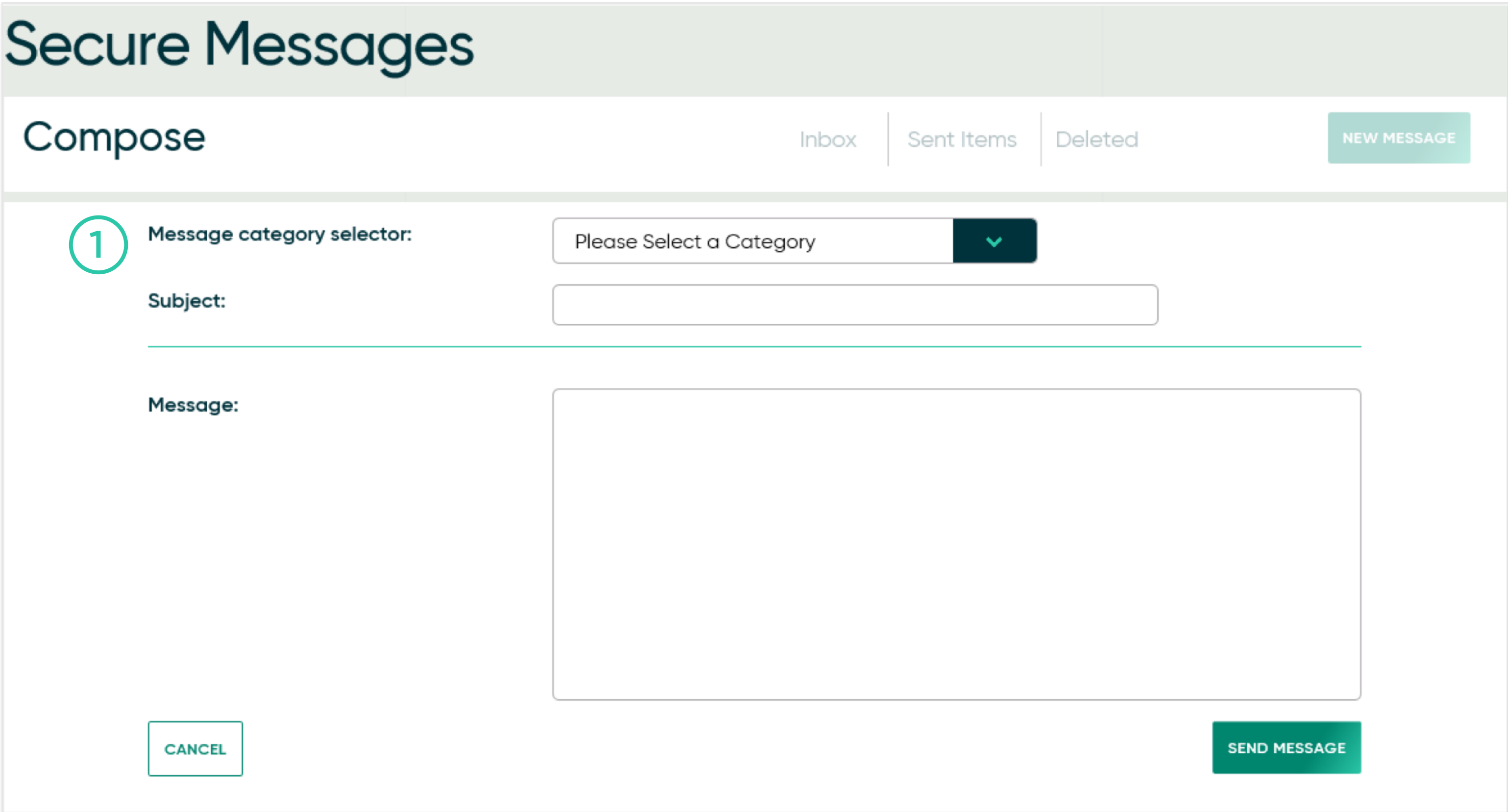


3. Once you have filled out the form, select ‘send message’.



How to change your address

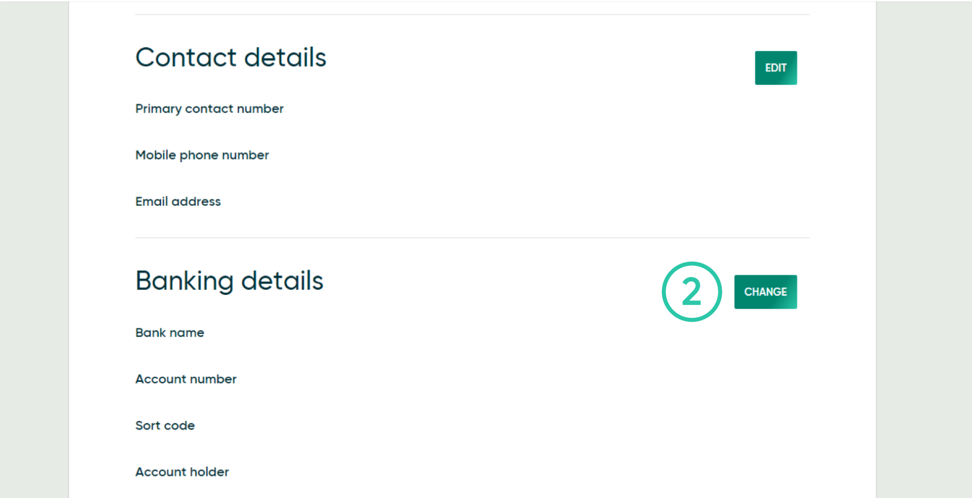
1. To change your address, you can send us a secure message by following the instructions on the previous page. Simply select 'other' for the category, fill out the form and select 'send message'.



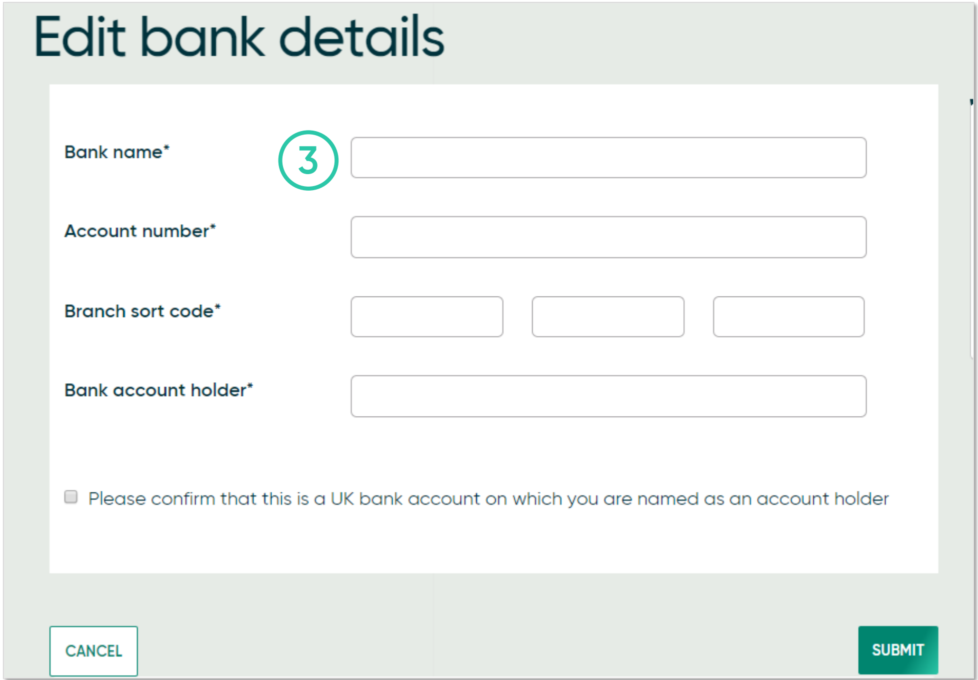
How to change your bank details

1. Once you log in to your account, on your dashboard select ‘profile’ found in the top right corner.

2. Your profile will open on personal details, scroll down the page to find banking details and select ‘change’.

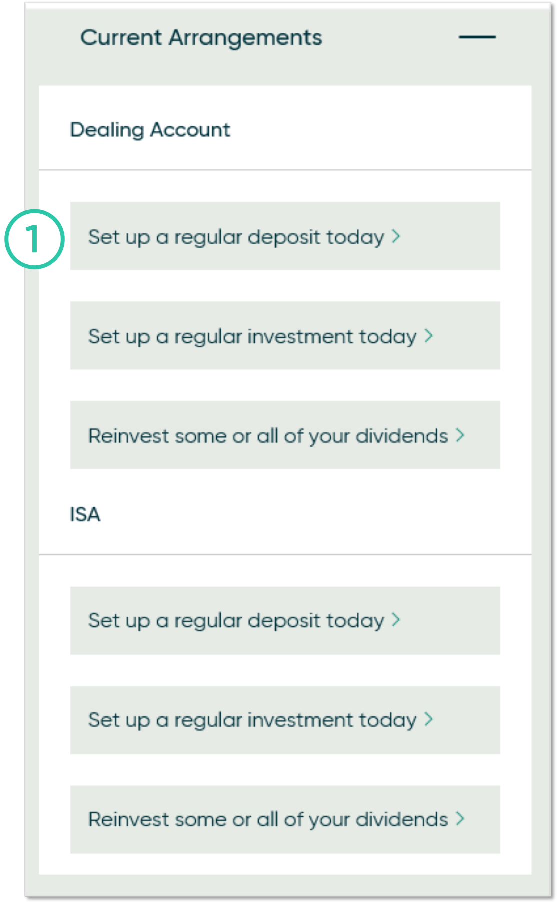


3. Once you have edited your bank details, select ‘submit’.

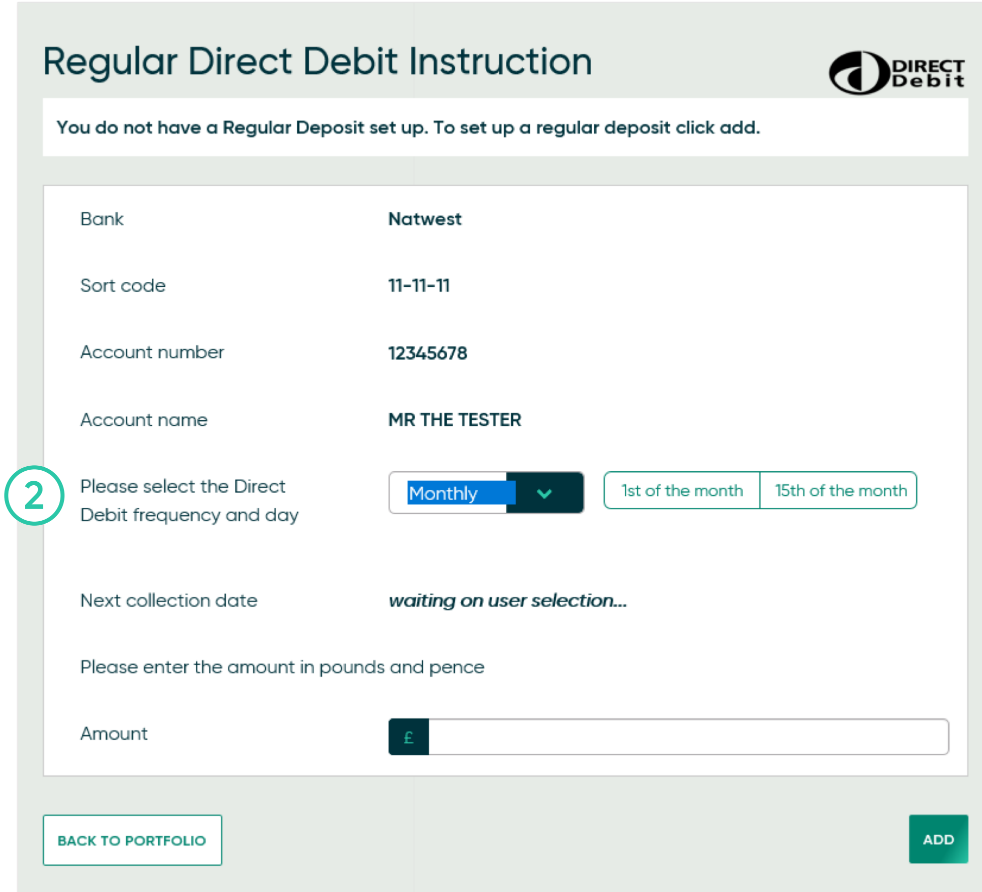


How to set up a regular deposit

1. On your dashboard scroll down to current arrangements and under your chosen account, select 'set up a regular deposit today'.

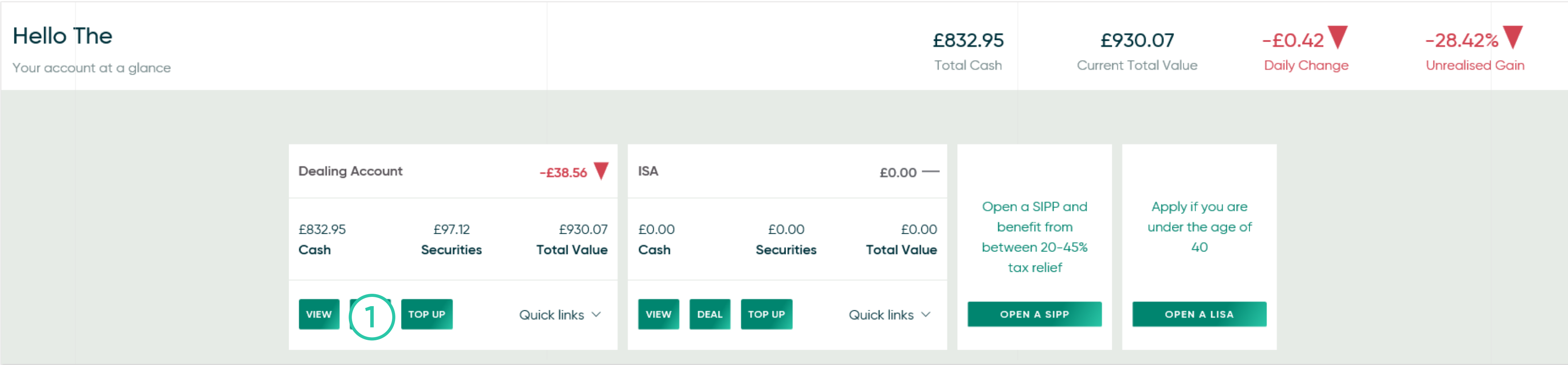


2. On the next screen you can nominate your regular direct debit instructions. Once complete, select 'add' to make the request.



How to top up your account

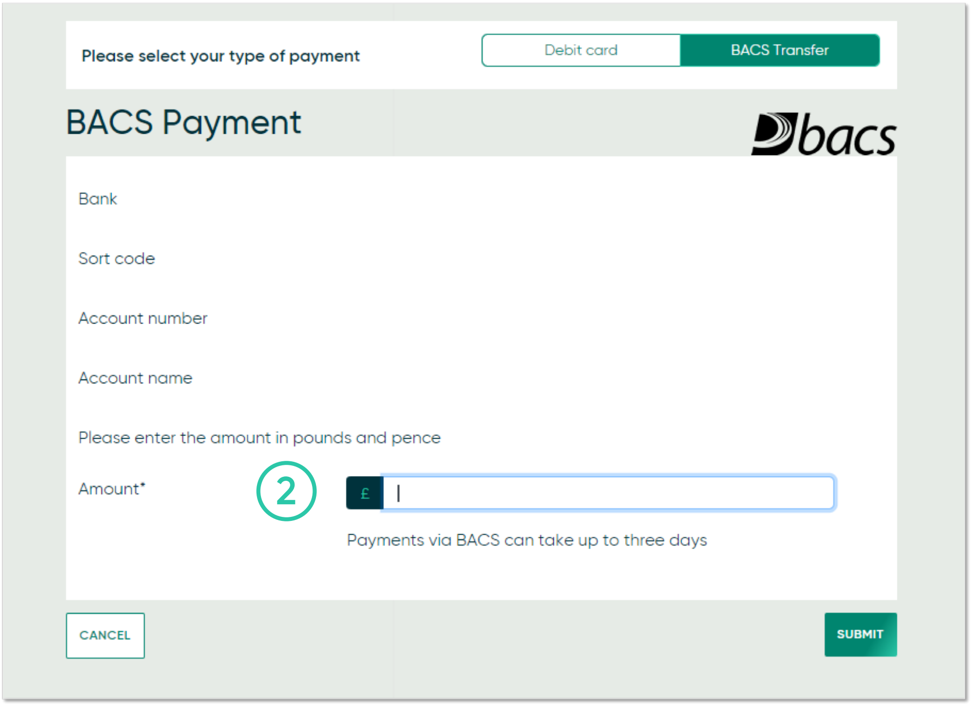
1. On your dashboard under each account you hold, select ‘top up’ on your chosen account.

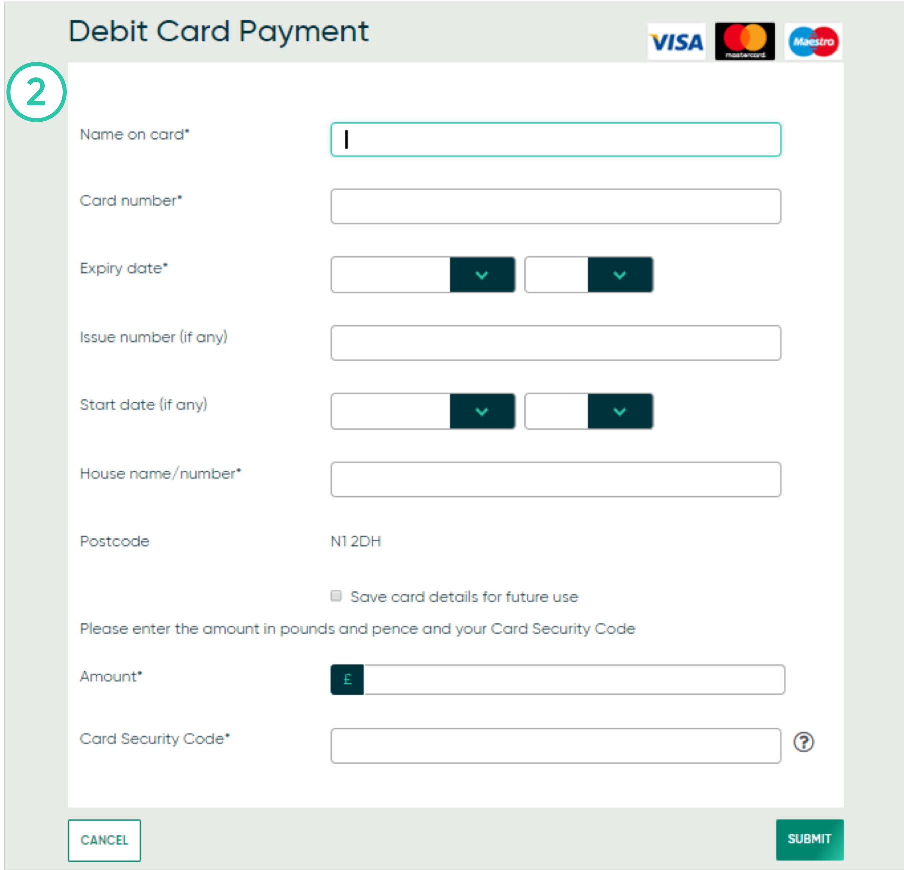


2. On the next screen you will be presented with how you would like to pay. Continued on the next page.

How to top up your account continued

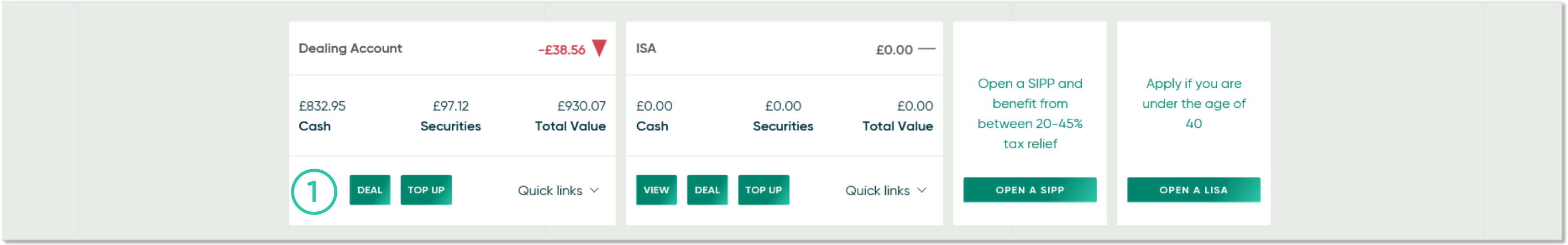
2. Payments by debit card will go through immediately, whereas BACs transfers should take three days to process. Once you have completed your payment details, select ‘submit’.





How to buy an investment

1. On your dashboard screen select 'deal' on the account you wish to buy an investment in.

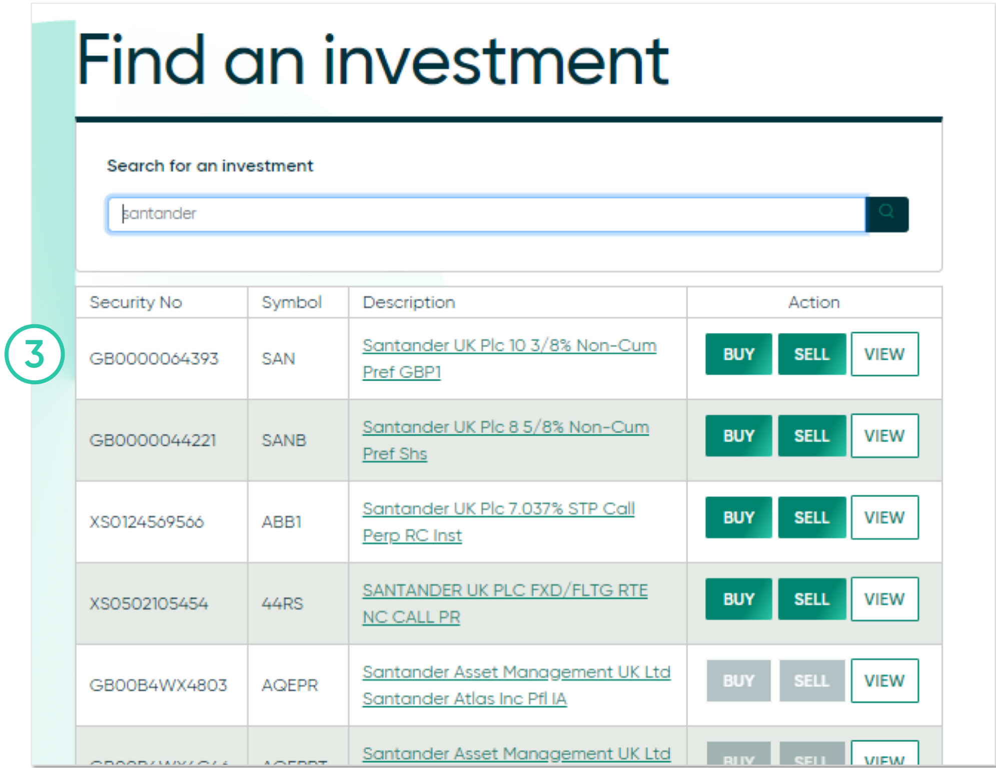


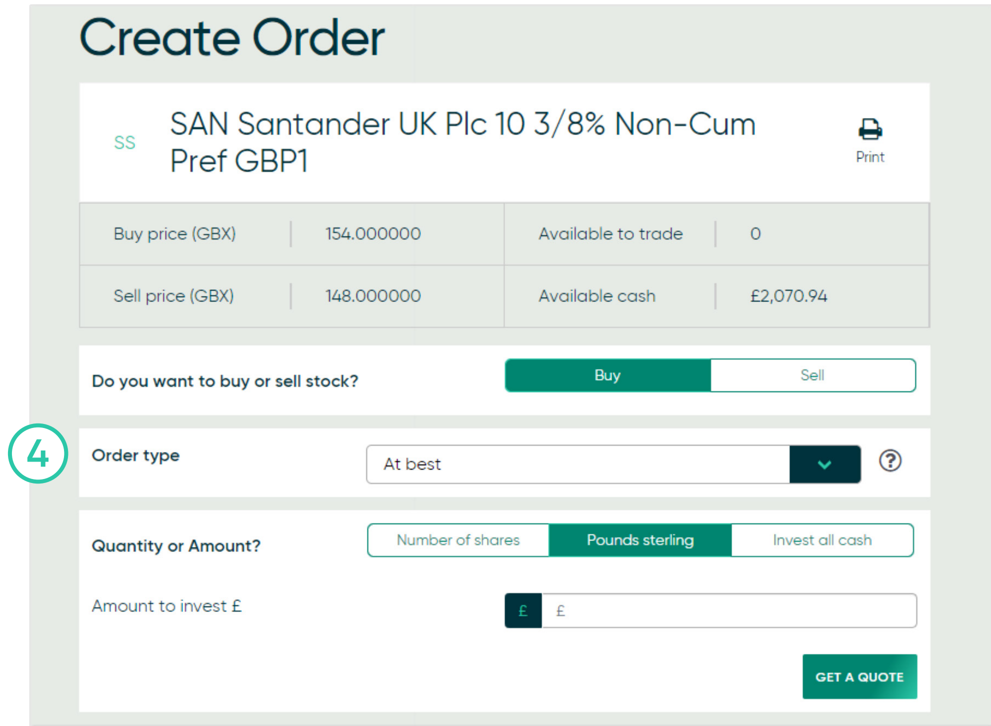
2. Type the name of the investment you would like to purchase into the search bar.

How to buy an investment continued

3. Find the correct stock and select the 'buy' button to start the trade.

4. On the next screen you can select the order type (at best, limit order or rising buy order) and the amount to trade (number of shares or value).
Finally, select 'get a quote'.



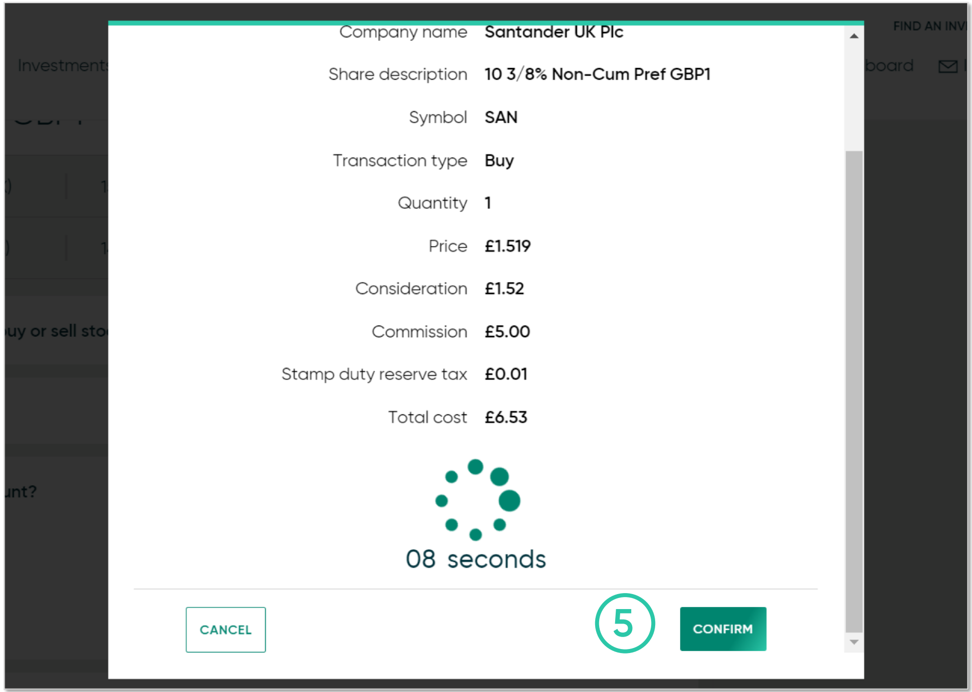


How to buy an investment continued

5. For an ‘at best’ trade you will see a quote window for 15 seconds.

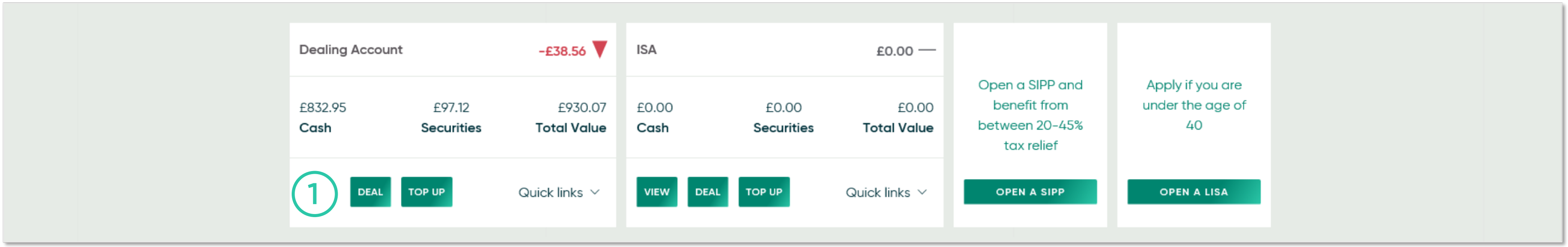
   If you run out of time you can run the quote again until you are ready to confirm, this is to ensure you have an up to date price.

   To proceed with the trade, select ‘confirm’ to complete the purchase.

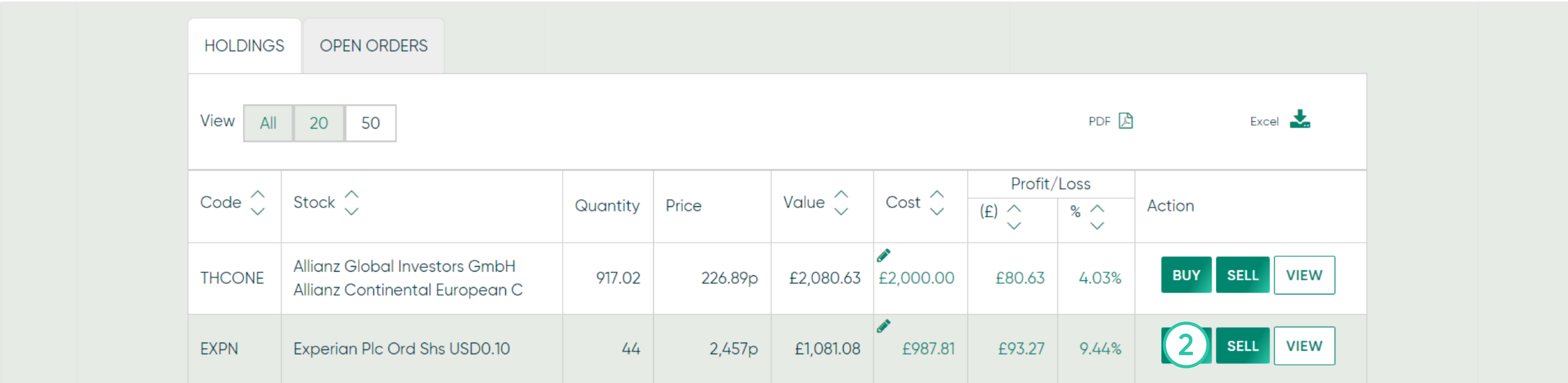


How to sell an investment

1. On your dashboard screen select ‘view’ on the account you wish to sell an investment in.



2. On your portfolio page of your chosen account select ‘sell’ on the investment.



Code	Stock	Quantity	Price	Value	Cost	Profit/Loss (£)	Profit/Loss %	Action
THCONE	Allianz Global Investors GmbH Allianz Continental European C	917.02	226.89p	£2,080.63	£2,000.00	£80.63	4.03%	BUY SELL VIEW
EXPN	Experian Plc Ord Shs USD0.10	44	2,457p	£1,081.08	£987.81	£93.27	9.44%	SELL VIEW

How to sell an investment continued

3. On the order screen select the quantity to sell and select ‘get a quote’.

4. For an ‘at best’ trade you will see a quote window for 15 seconds.

   If you run out of time you can run the quote again until you are ready to confirm, this is to ensure you have an up to date price.

   To proceed with the trade, select ‘confirm’ to complete the sale.