



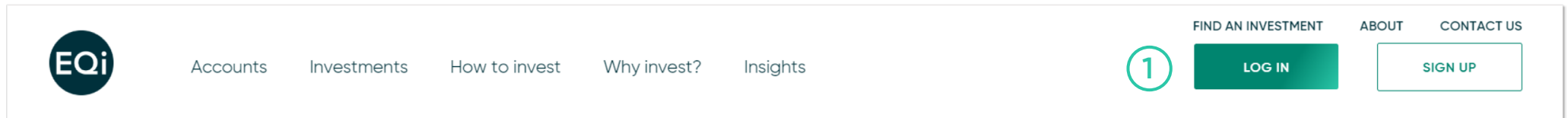
# Guide to using your EQi account dashboard



# 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.

A screenshot of the 'Log in to your EQi account' page. The title is 'Log in to your EQi account'. Below it is the label 'Account Number\*'. A green circle with the number '2' is next to a text input field containing the placeholder 'Enter Account Number'. Below this is the label 'Date of Birth\*'. There are three dropdown menus for 'Day', 'Month', and 'Year', each with a teal arrow icon. At the bottom is a teal 'CONTINUE' button.

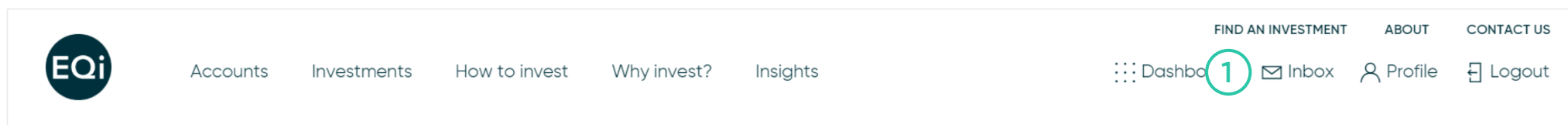
3. Finally, enter the selected numbers from your PIN.

A screenshot of the 'Log in to your EQi account' page. The title is 'Log in to your EQi account'. Below it is the label 'Please enter the following 3 digits from your PIN\*'. A green circle with the number '3' is next to three dropdown menus labeled '5th character', '6th character', and '8th character'. Each dropdown menu contains the text 'Select pin' and a teal arrow icon. Below these is a teal 'LOGIN' button. At the bottom is a link that says 'Forgotten your login details?'.

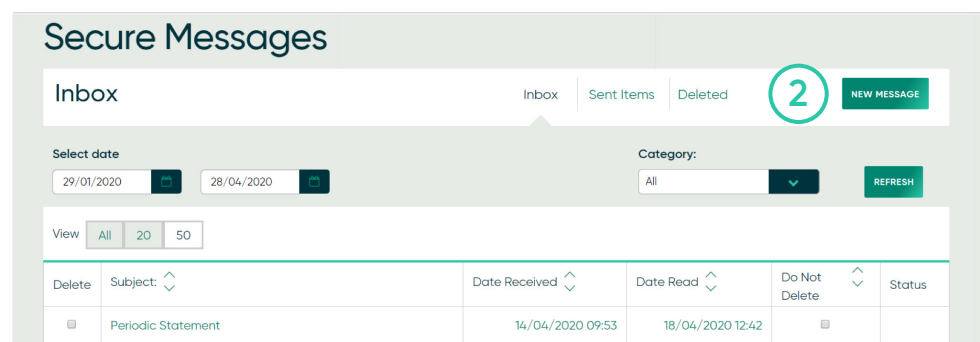
# How to view and send secure messages



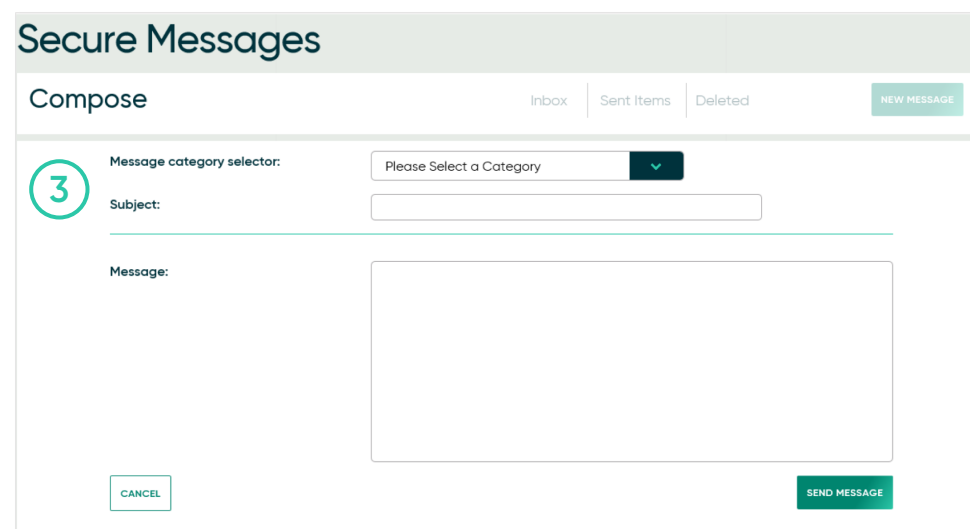
1. Once you log in to your account, on your dashboard select 'inbox' in the top right corner to view your secure messages.



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'.

## Secure Messages

### Compose

Inbox | Sent Items | Deleted

NEW MESSAGE

1

Message category selector:

Please Select a Category

▼

Subject:

Message:

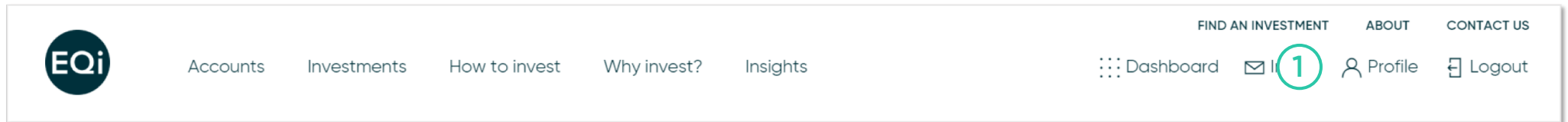
CANCEL

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'.

A screenshot of the 'Profile' page. It has two main sections: 'Contact details' and 'Banking details'. The 'Contact details' section has an 'EDIT' button. The 'Banking details' section has a 'CHANGE' button, which is highlighted with a green circle containing the number '2'. The fields in the 'Banking details' section are 'Bank name', 'Account number', 'Sort code', and 'Account holder'.

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

A screenshot of the 'Edit bank details' form. It has a title 'Edit bank details' at the top. Below it are four input fields: 'Bank name\*' (with a green circle containing the number '3' next to it), 'Account number\*', 'Branch sort code\*' (which is a three-part input), and 'Bank account holder\*'. At the bottom of the form is a checkbox with the text 'Please confirm that this is a UK bank account on which you are named as an account holder'. At the very bottom are two buttons: 'CANCEL' and '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'.

The screenshot shows a mobile app interface titled 'Current Arrangements'. Under the 'Dealing Account' section, there are three buttons: 'Set up a regular deposit today >', 'Set up a regular investment today >', and 'Reinvest some or all of your dividends >'. The first button is highlighted with a green circle and the number 1. Below this section is an 'ISA' section with three similar buttons.

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

The screenshot shows a mobile app interface titled 'Regular Direct Debit Instruction'. At the top, it says 'You do not have a Regular Deposit set up. To set up a regular deposit click add.' Below this, there are fields for 'Bank' (Natwest), 'Sort code' (11-11-11), 'Account number' (12345678), and 'Account name' (MR THE TESTER). A green circle with the number 2 highlights the 'Please select the Direct Debit frequency and day' section, which includes a dropdown menu set to 'Monthly' and two buttons: '1st of the month' and '15th of the month'. Below this, there is a field for 'Next collection date' (waiting on user selection...) and a field for 'Amount' (Please enter the amount in pounds and pence). At the bottom, there are two buttons: 'BACK TO PORTFOLIO' and 'ADD'.



# How to top up your account

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

Hello The

Your account at a glance

£832.95

Total Cash

£930.07

Current Total Value

−£0.42

Daily Change

−28.42%

Unrealised Gain

Dealing Account

−£38.56

£832.95

Cash

£97.12

Securities

£930.07

Total Value

VIEW

1

TOP UP

Quick links

ISA

£0.00

£0.00

Cash

£0.00

Securities

£0.00

Total Value

VIEW

DEAL

TOP UP

Quick links

Open a SIPP and benefit from between 20-45% tax relief

OPEN A SIPP

Apply if you are under the age of 40

OPEN A LISA

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'.

Please select your type of payment

Debit card BACS Transfer

### BACS Payment

Bank

Sort code

Account number

Account name

Please enter the amount in pounds and pence

Amount\* **2** £ |

Payments via BACS can take up to three days

CANCEL SUBMIT

### Debit Card Payment

**2**

Name on card\* |

Card number\* |

Expiry date\* | |

Issue number (if any) |

Start date (if any) | |

House name/number\* |

Postcode N1 2DH

☐ Save card details for future use

Please enter the amount in pounds and pence and your Card Security Code

Amount\* £ |

Card Security Code\* | ?

CANCEL SUBMIT





# How to buy an investment

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

The screenshot shows the EQi dashboard with two main account sections: 'Dealing Account' and 'ISA'. The 'Dealing Account' section shows a balance of -£38.56 and a table with columns for Cash (£832.95), Securities (£97.12), and Total Value (£930.07). Below the table are buttons for 'DEAL' and 'TOP UP', and a 'Quick links' dropdown. The 'ISA' section shows a balance of £0.00 and a similar table with columns for Cash (£0.00), Securities (£0.00), and Total Value (£0.00). Below the table are buttons for 'VIEW', 'DEAL', and 'TOP UP', and a 'Quick links' dropdown. To the right of these sections are two cards: 'Open a SIPP and benefit from between 20-45% tax relief' with an 'OPEN A SIPP' button, and 'Apply if you are under the age of 40' with an 'OPEN A LISA' button. A green circle with the number '1' is placed over the 'DEAL' button in the 'Dealing Account' section.

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

The screenshot shows the EQi dashboard with a large green curved shape on the left. The main heading is 'Find an investment'. Below this is a search bar with the placeholder text 'Search for an investment'. To the right of the search bar is a button with a magnifying glass icon. A green circle with the number '2' is placed over the search bar. To the right of the search bar is the heading 'Dealing Account'.

# How to buy an investment continued



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

## Find an investment

Search for an investment

3

Security No	Symbol	Description	Action
GB0000064393	SAN	<a href="#">Santander UK Plc 10 3/8% Non-Cum Pref GBP1</a>	<a href="#">BUY</a> <a href="#">SELL</a> <a href="#">VIEW</a>
GB0000044221	SANB	<a href="#">Santander UK Plc 8 5/8% Non-Cum Pref Shs</a>	<a href="#">BUY</a> <a href="#">SELL</a> <a href="#">VIEW</a>
XS0124569566	ABB1	<a href="#">Santander UK Plc 7.037% STP Call Perp RC Inst</a>	<a href="#">BUY</a> <a href="#">SELL</a> <a href="#">VIEW</a>
XS0502105454	44RS	<a href="#">SANTANDER UK PLC FXD/FLTG RTE NC CALL PR</a>	<a href="#">BUY</a> <a href="#">SELL</a> <a href="#">VIEW</a>
GB00B4WX4803	AQEPR	<a href="#">Santander Asset Management UK Ltd</a> <a href="#">Santander Atlas Inc Pfl IA</a>	<a href="#">BUY</a> <a href="#">SELL</a> <a href="#">VIEW</a>
GB00B4WX4803	AQEPR	<a href="#">Santander Asset Management UK Ltd</a>	<a href="#">BUY</a> <a href="#">SELL</a> <a href="#">VIEW</a>

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'.

## Create Order

SS SAN Santander UK Plc 10 3/8% Non-Cum Pref GBP1 [Print](#)

Buy price (GBX)	154.000000	Available to trade	0
Sell price (GBX)	148.000000	Available cash	£2,070.94

Do you want to buy or sell stock? [Buy](#) [Sell](#)

Order type  [?](#)

Quantity or Amount?

Amount to invest £

[GET A QUOTE](#)

4

# 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.

A screenshot of a quote window for Santander UK Plc. The window displays the following details: Company name: Santander UK Plc, Share description: 10 3/8% Non-Cum Pref GBP1, Symbol: SAN, Transaction type: Buy, Quantity: 1, Price: £1.519, Consideration: £1.52, Commission: £5.00, Stamp duty reserve tax: £0.01, and Total cost: £6.53. At the bottom, there is a circular progress indicator with the text '08 seconds' and a large green circle with the number '5'. Below the progress indicator are two buttons: 'CANCEL' and 'CONFIRM'. The background of the window is dark grey, and the text is white.



# How to sell an investment

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

The dashboard displays two main account sections: 'Dealing Account' and 'ISA'. The 'Dealing Account' shows a balance of -£38.56 with sub-totals for Cash (£832.95), Securities (£97.12), and Total Value (£930.07). The 'ISA' section shows a balance of £0.00 with similar sub-totals. Both sections have 'VIEW', 'DEAL', and 'TOP UP' buttons, along with a 'Quick links' dropdown. To the right, there are two informational boxes: 'Open a SIPP and benefit from between 20-45% tax relief' with an 'OPEN A SIPP' button, and 'Apply if you are under the age of 40' with an 'OPEN A LISA' button. A red circle with the number '1' highlights the 'VIEW' button in the Dealing Account section.

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

The portfolio page shows a table of holdings under the 'HOLDINGS' tab. The table has columns for Code, Stock, Quantity, Price, Value, Cost, Profit/Loss (in £ and %), and Action. Two investments are listed: 'THCONE' (Allianz Global Investors GmbH) and 'EXPN' (Experian Plc). The 'EXPN' row has a red circle with the number '2' highlighting the 'SELL' button in the Action column. Above the table, there are filters for 'View' (All, 20, 50), a 'PDF' download icon, and an 'Excel' download icon.

Code	Stock	Quantity	Price	Value	Cost	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%	<a href="#">BUY</a> <a href="#">SELL</a> <a href="#">VIEW</a>
EXPN	Experian Plc Ord Shs USD0.10	44	2,457p	£1,081.08	£987.81	£93.27	9.44%	<a href="#">2</a> <a href="#">SELL</a> <a href="#">VIEW</a>

# 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.

### Create Order

EE EXPN Experian Plc Ord Shs USD0.10 Print

Buy price (GBX)	2,340.000000	Available to trade	44
Sell price (GBX)	2,339.000000	Available cash	£2,270.94

Do you want to buy or sell stock? Buy Sell

Order type At best ?

Quantity or Amount? Number of shares Pounds sterling Sell all holdings

Quantity to sell

3 GET A QUOTE

Company name: Experian Plc

Share description: Ord Shs USD0.10

Symbol: EXPN

Transaction type: Sell


Quantity: 1

Price: £24.66

Consideration: £24.66

Commission: £5.00

Total proceeds: £19.66



10 seconds

CANCEL 4 CONFIRM