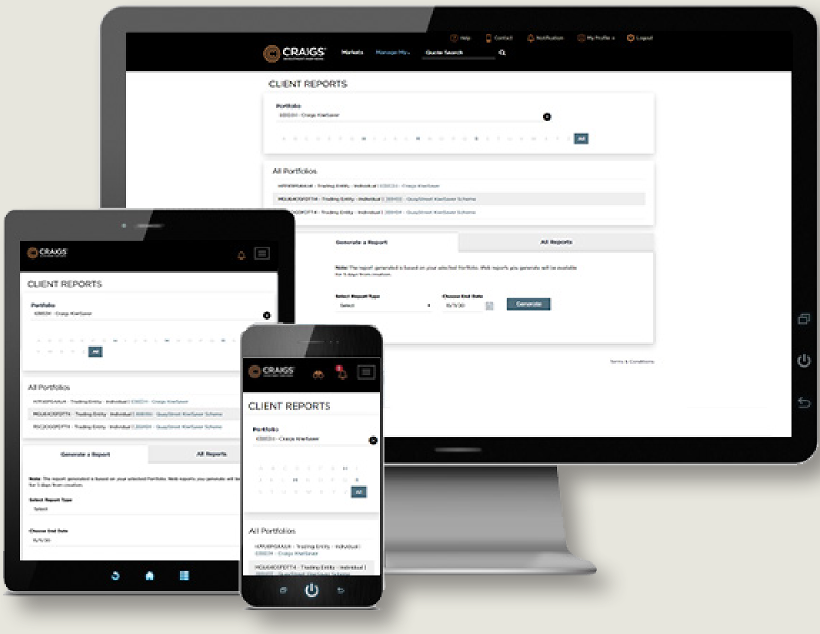
CRAIGS®
INVESTMENT PARTNERS

Client portal guide

Professionals guide

Monitor the performance of your clients' investments on any device, anywhere, anytime.



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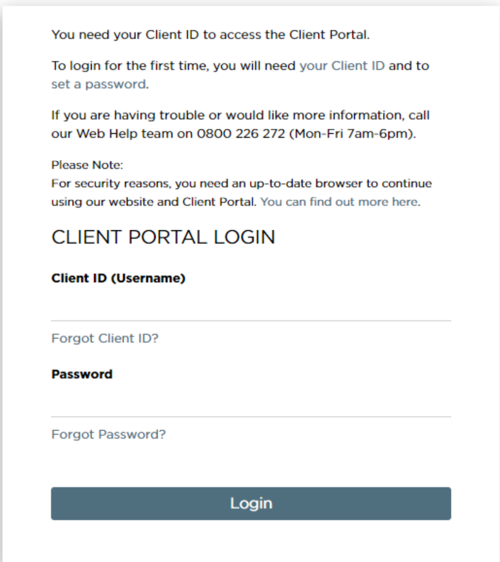
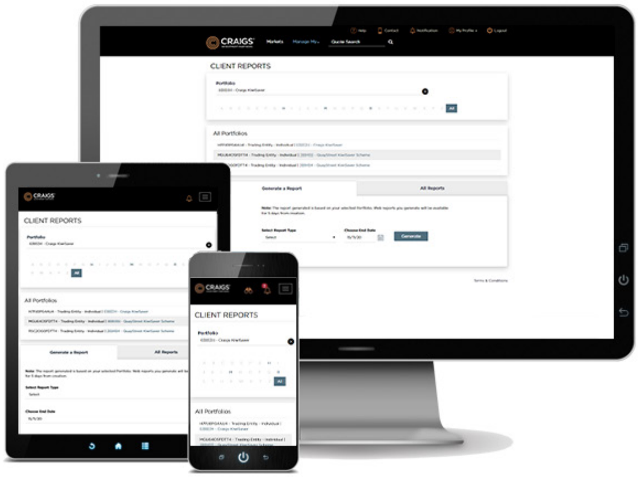
Introduction

The client portal allows you to monitor the performance of your clients' investments on any device, anywhere, anytime.

Contents:

Accessing the client portal





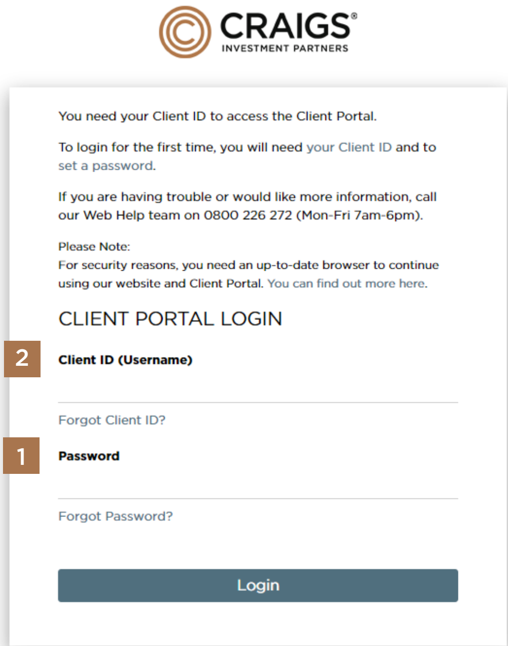
To access the client portal for the first time, follow these steps:

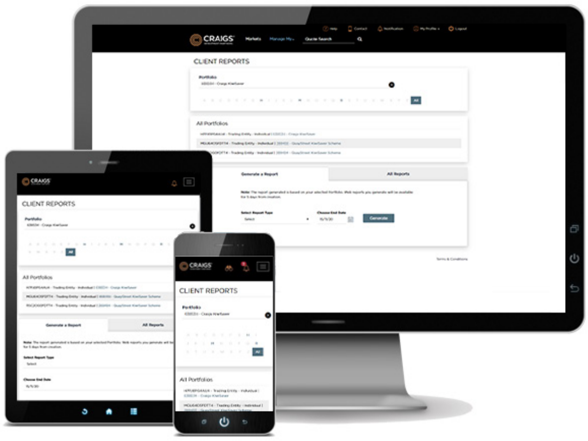
1. You will have been issued with a Client ID or received your Client ID in a recent letter or email.
2. Set your password by clicking the set password link in the Client ID email or **clicking here >**
3. If you have a mobile phone number associated with your account, you can select whether to complete your validation by receiving a code via text message or a link via email.
4. Once you have completed the validation steps, you can set a new password. Your password needs to be comprised of a minimum of 8 characters, containing at least 1 uppercase letter, 1 lowercase letter and 1 digit.
5. You will then be redirected to the login page to enter your Client ID and password.

Please note - If you think you may have registered on the old client portal, or have forgotten your Client ID then visit the login page and click the **Forgot Client ID?** link and follow the prompts.

Need help?

If you experience any issues accessing our client portal please email webhelp@craigsip.com or phone 0800 226 272 (Mon-Fri, 7am–6pm).





Forgotten your Password?

1. Reset your password by clicking on the **Forgot Password?** link on the login page. 1
2. Enter your Client ID and Last Name to receive an identity validation message by email or text message.
3. If you have a mobile phone number associated with your account, you can select whether to complete your validation by receiving a code via text message or a link via email.
4. Once you have completed the validation steps, you can set a new password. Your password needs to be comprised of a minimum of 8 characters, containing at least 1 uppercase letter, 1 lowercase letter and 1 digit.
5. You will then be redirected to the login page to enter your Client ID and new password.

Forgotten your Client ID?

1. Receive a Client ID reminder by clicking on the **Forgot Client ID?** link on the login page. 2
2. Complete the form by entering your first name, last name and registered email address.
3. You will then receive an email reminding you of your Client ID.

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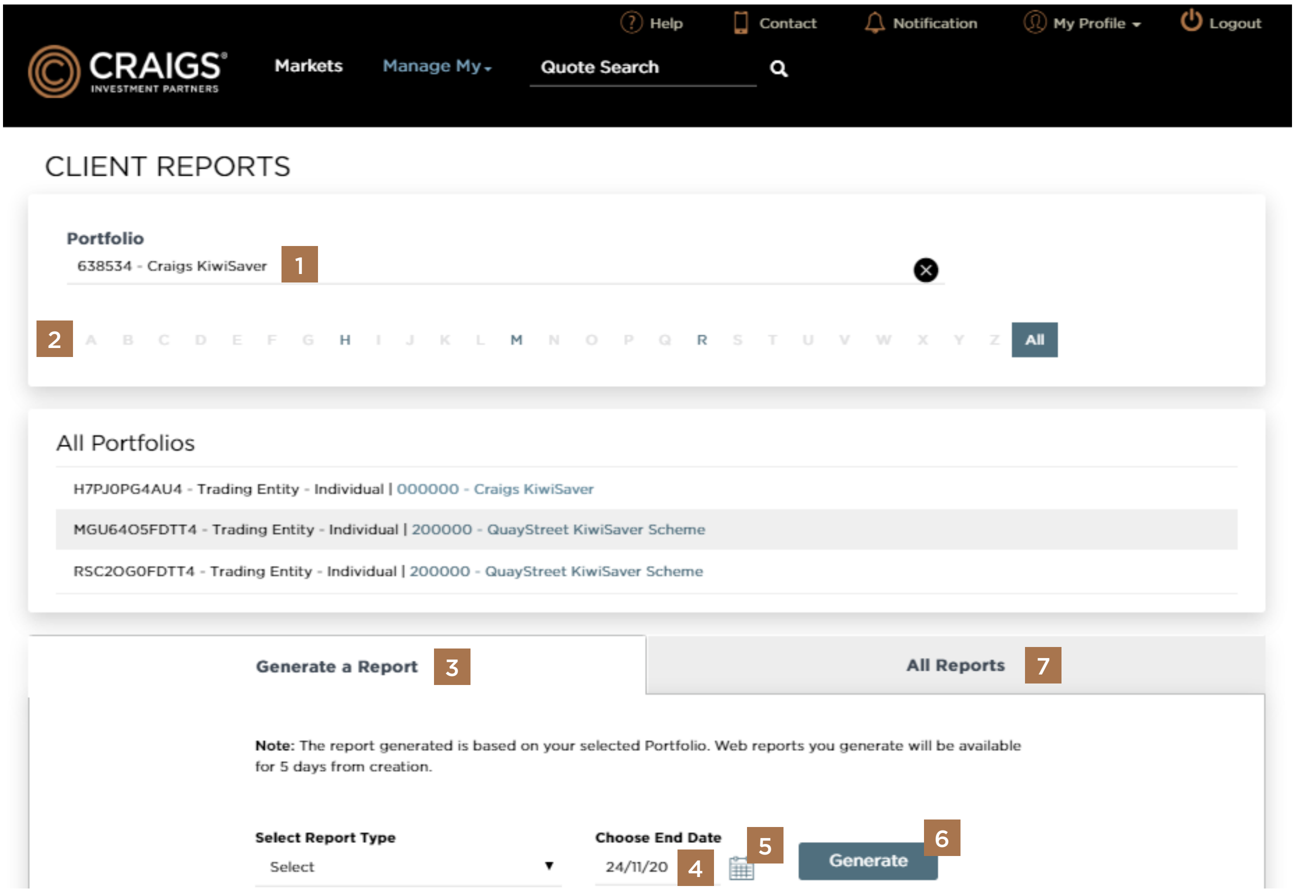
Client reports

The client reports section allows you to generate portfolio reports and view all reports, including tax reports, issued by Craigs for specific client portfolios.



Generate a Report

1. To see the reporting for a specific client portfolio, you can either search by name using the search bar 1 or by using the alphabetic filters. 2
2. Go to the **Generate a Report** tab. 3
3. Choose the type of report that you would like to view by selecting it from the **Select Report Type** dropdown list.
4. The date of the previous day will be displayed in the **Choose End Date** field. If you would like to change this date type your chosen date in this box following the DD/MM/YY 4 format or select the Calendar icon. 5
5. Select the **Generate** button. 6
6. Your report will begin generating and will be displayed when it is ready, alternatively the report can also be found by selecting the **All Reports** tab on the Reports page. 7

View All Reports

On the **All Reports** tab, 7 you can view the web reports that you have generated in the last five days and view all the reports distributed to your client by Craigs in the last two years - including tax reports.

Managed portfolios have access to a number of reports providing an overview of your clients' portfolio position.

KiwiSaver, Superannuation and Savings portfolios can view their Holdings Statements, Contributions and Withdrawals Summary and a Portfolio Summary.

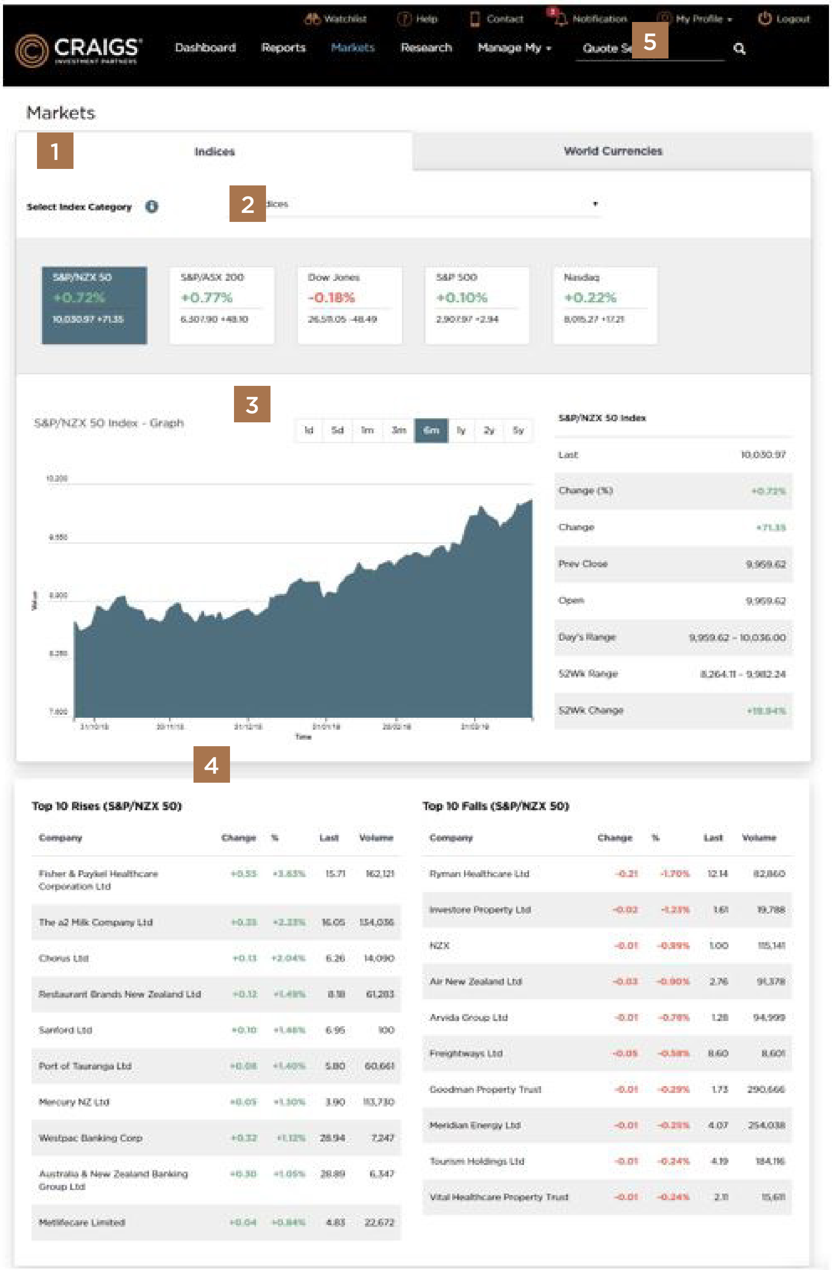
Markets

The Markets section provides comprehensive market data information and dynamic charting for leading global markets, enabling you to easily keep informed of market movements.

Indices

1. On the Indices tab 1, you can quickly check the performance of the top indices or select a regional overview of Asia-Pacific, North America or Europe from the **Select Index Category** dropdown list. 2
2. The performance of your selected index can be viewed over a 5 day, 1 month, 3 month, 6 month, 1 year, 2 year or 5 year timeframe. 3
3. The Top 10 Rises/Falls section shows a snapshot of the days top performers and underperformers on the S&P/NZX50 and S&P/ASX200 including the dollar and percentage change, last price, and volume traded. 4
4. The latest research associated with your selected index is also provided at the bottom of the page.

Please note: Market data on other indices can be found by performing a **Quote Search** from the navigation bar(s). For further details, see the Quote Search section, page 13. 5



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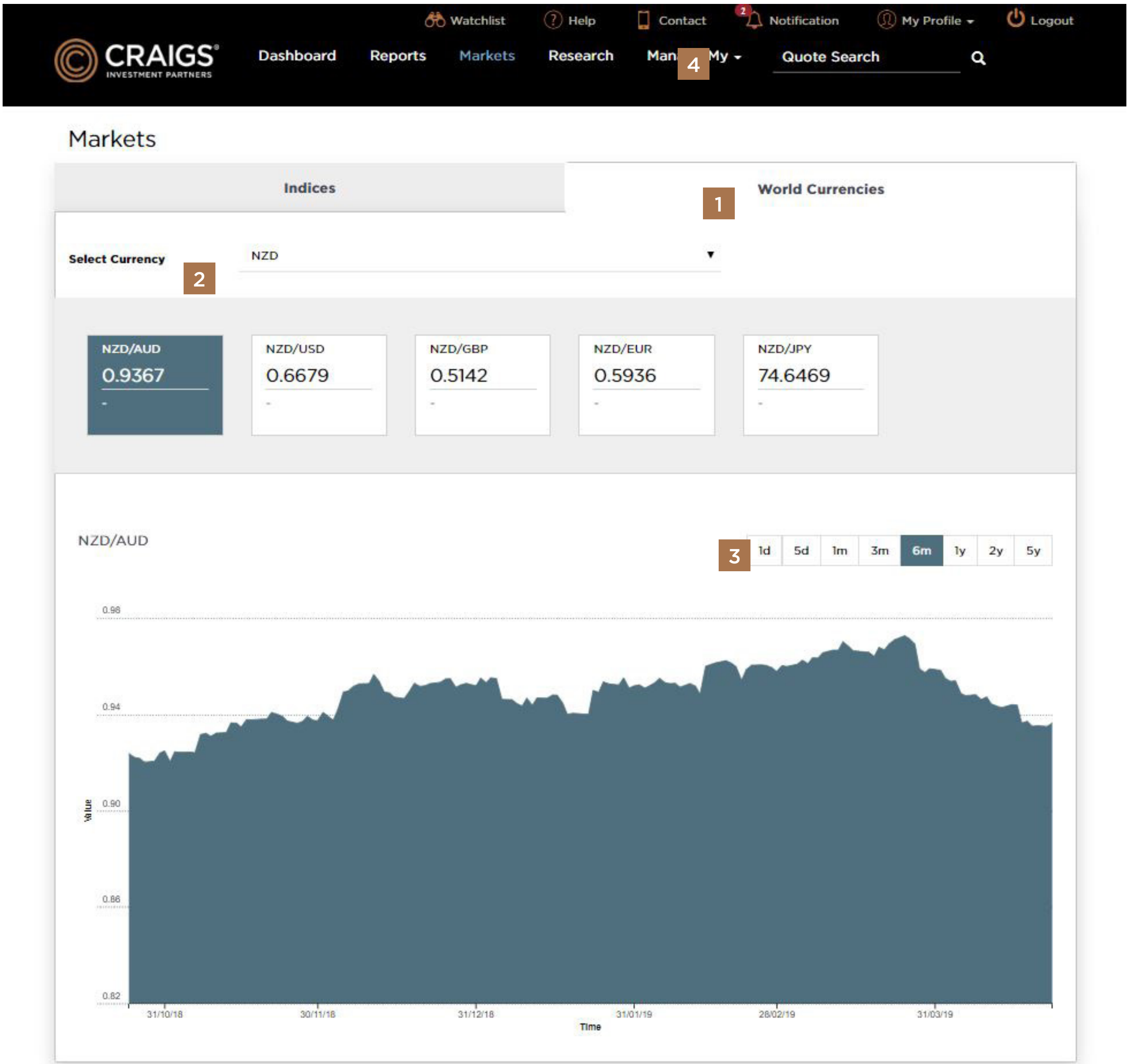


1. On the **World Currencies** tab, you can quickly see the performance of key New Zealand dollar (NZD) and US dollar (USD) currency pairs. 1

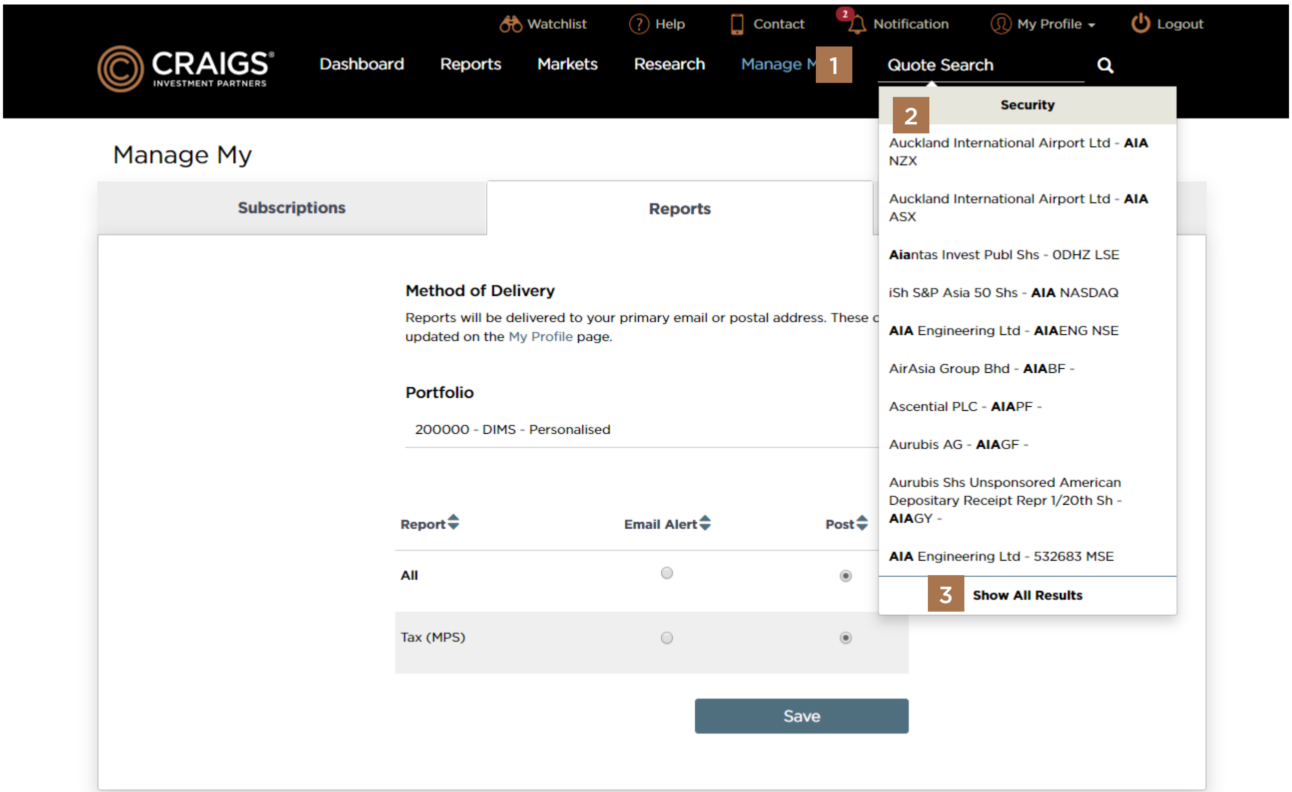
2. Switch between NZD and USD by clicking on the **Select Currency** dropdown list. 2

3. The performance of your selected currency pair can be viewed over a 5 day, 1 month, 3 month, 6 month, 1 year, 2 year or 5 year period. 3

Please note: Market data on other currency pairs can be found by performing a **Quote Search** from the navigation bar. 4 For further details, see the Quote Search section, page 13.

Quote Search

The Quote Search is accessible directly from the navigation bar and allows you to search for market data on securities (shares and fixed interest), indices and currencies.



1. Begin to enter a search term in the **Quote Search** field. 1

2. You will see an automatically populated list of the available market data matches. 2

3. Select the security, index or currency of interest and the market details will display or **Show All Results** to see a full list. 3

Other Helpful Sections

My Profile

In the **My Profile** section you can review and manage your personal details and reset your password.

Notification

By selecting **Notification** you can see a list of messages of interest or that require your attention e.g. when a new report is available.

Help

In the **Help** section you can view a guided tour of the client portal and read the answers to frequently asked questions

Contact

By selecting **Contact** in the navigation bar you can quickly access the contact details of your Investment Adviser(s).

Further Questions?

- Read the FAQ guide in the Help Section on the client portal
- Contact our Web Help team - email:
  webhelp@craigsip.com or phone 0800 226 272
  (Mon–Fri, 7am–6pm).

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