

IN PURSUIT OF CERTAINTY



THE WEBSITE | LOGIN USER GUIDE

NEW INDIVIDUAL INVESTOR

This document will provide an overview of the web functionality for Alexander Forbes Investments.

A user can log in through various levels, the functionality and information available will be dependent on the role the user has been given.

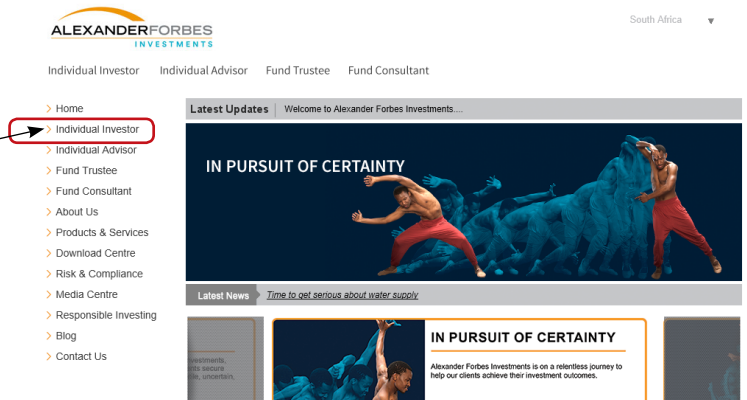
IF YOU DID NOT RECEIVE AN EMAIL CONFIRMING YOUR ONLINE ACCESS, PLEASE CONTACT THE CALL CENTRE FOR ASSISTANCE ON 0860 333 316.

STEP 1

Website address:

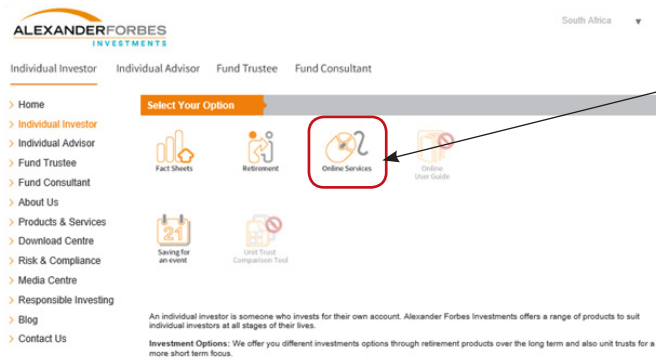
www.alexanderforbesinvestments.co.za

On Alexander Forbes Investments homepage click on Individual Investor



STEP 2

Click on Online Services



STEP 3

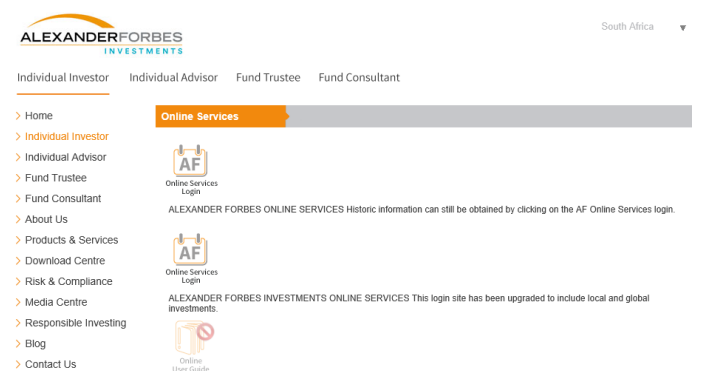
On the Online Services page select one of the two options



ALEXANDER FORBES ONLINE SERVICES Historic information can still be obtained by clicking on the AF Online Services login.



ALEXANDER FORBES INVESTMENTS ONLINE SERVICES This login site has been upgraded to include local and global investments.



STEP 4



By clicking on AF Online Services Login you will be directed to this page to access your historic information. Enter your pin and password as was done previously.

Welcome to Private Investors Online, our gateway to secure online values, information and functionality relating to your retirement fund, and investments.

Kindly note:

A single sign on strategy has been implemented that will allow you to login to Alexander Forbes or Investment Solutions Online using a single pin and password.

If you have pins and passwords for both Alexander Forbes Online as well as Investment Solutions Online, please send an e-mail to the Client Interaction Centre on investadmin@aforbes.co.za indicating which pin and password you would like to retain in order to enable you to login to both sites with one pin and password.

PIN:

PASSWORD:

Forgot ten your password?
Please contact the Client Interaction Centre on 0860-66-4444 for assistance.

STEP 5



By clicking on Alexander Forbes Investments Online Services Login you will be directed to this page.

Tick the Agree to terms and conditions box.

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Please note that in order to continue you are required to agree to the terms and conditions provided

Agree to [terms and conditions](#)

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FAIS licence number 711

STEP 6

Insert the username (as per the email received) and click on the Generate/ Reset Password button

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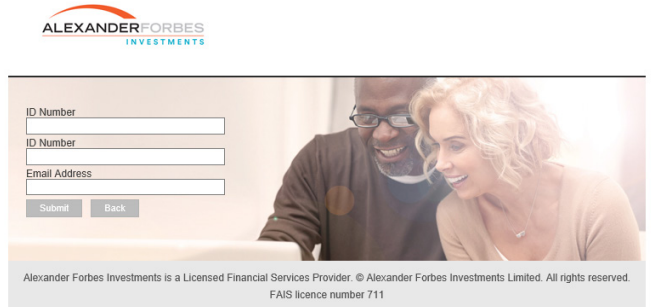
ID Number:

Password:

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STEP 7

Type in the Username (as per the email received), ID number and email address. Select the Submit button.



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ID Number

ID Number

Email Address

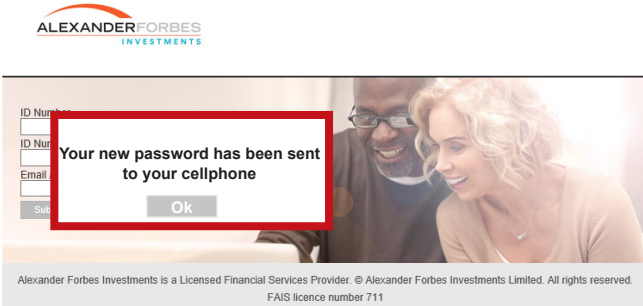
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STEP 8

The following confirmation message will be displayed: “Your new password has been sent to your cellphone.” Select Ok

NB: A temporary password will be sent to the user’s cellphone number (the cellphone number which is on the administration system). The user will receive the following message:

“Alexander Forbes Investments Online: Your temporary password is [PUK]. It will expire in [TIMEOUT] minutes. Contact your adviser or us on 0860 333 316 to query the SMS”.



ALEXANDER FORBES INVESTMENTS

ID Number

ID Number

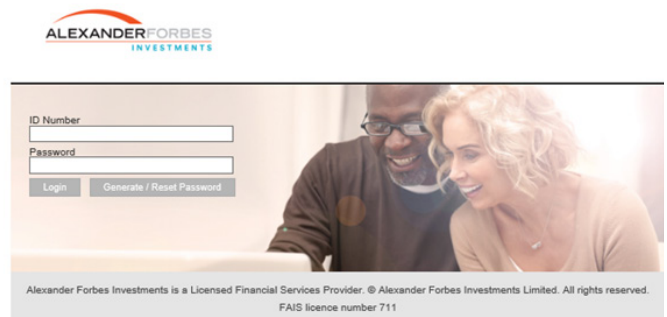
Email

Your new password has been sent to your cellphone

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STEP 9

Once the temporary password has been received, type in the Username (as per the email received) as well as the Password (the OTP received by SMS). Select the Login button.



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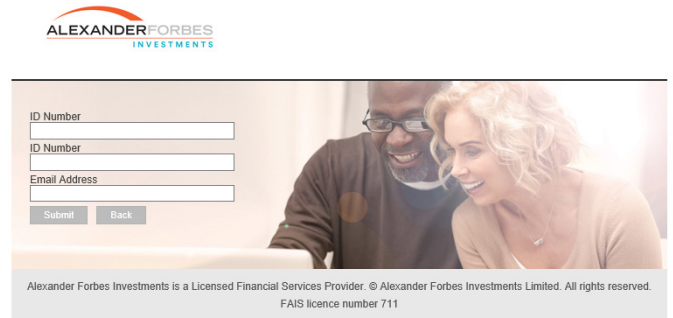
ID Number

Password

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STEP 10

Type in the 'Old Password', New Password and Confirm New Password fields. Click on the Change Password button.

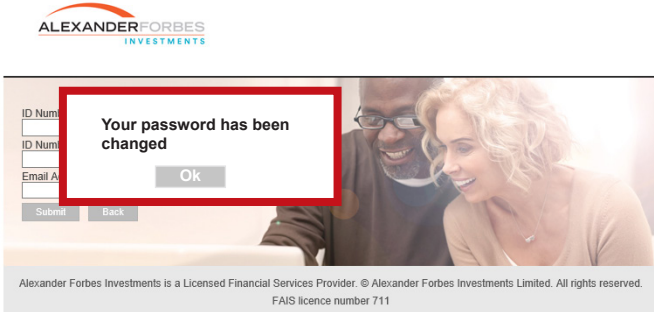


STEP 11

The following message will be displayed: "Your Password has been changed." Select Ok.

NB: A SMS will be sent to the you confirming that the user has logged-in to the system as well as your password has been successfully changed: The user will receive the following message:

"Alexander Forbes Investments Online: You have successfully logged in and changed your password. Contact your adviser or us on 0860 333 316 to query the SMS".



STEP 12

You are now logged in and will be able to view all your information.

