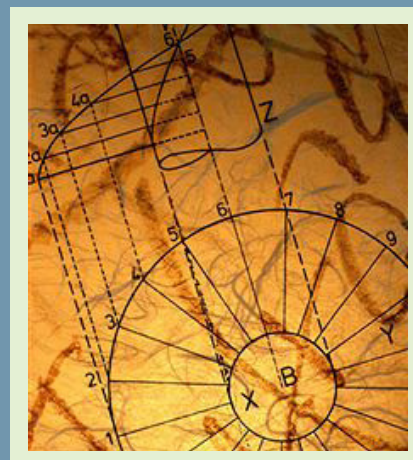




Investment
Solutions

With Confidence

THE WEBSITE login user guide



NEW

INDIVIDUAL INVESTOR

logging in from co.je

This document will provide an overview of the web functionality for Investment Solutions.

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

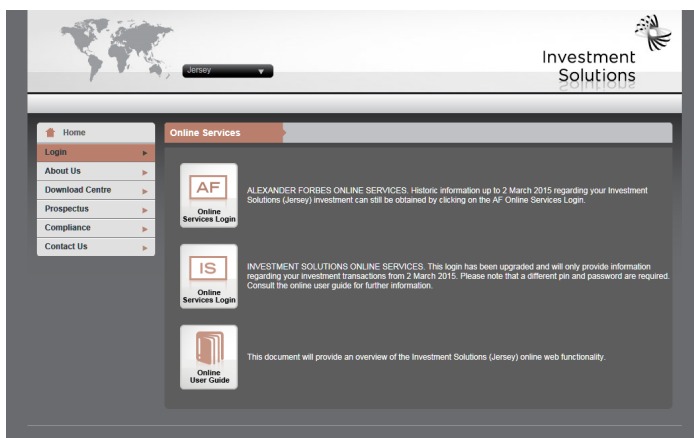
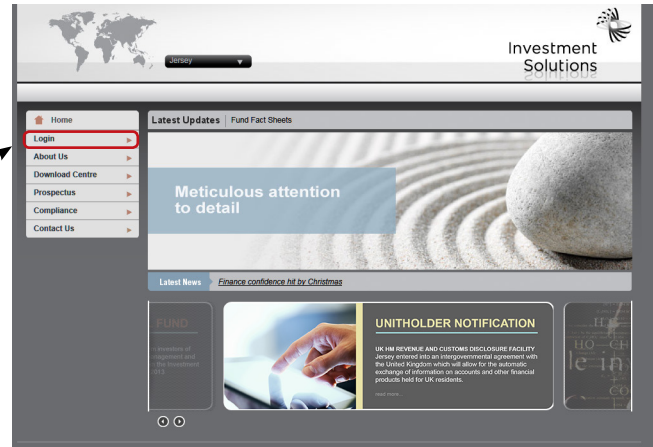
NEW INDIVIDUAL INVESTOR LOGIN

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.investmentsolutions.co.je

On the homepage click on Login



STEP 2

On the Online Services page select one of the two options



ALEXANDER FORBES ONLINE SERVICES. Historic information up to 2 March 2015 regarding your Investment Solution (Jersey) investment can still be obtained by clicking on the AF Online Services Login.



INVESTMENT SOLUTIONS ONLINE SERVICES. This login has been upgraded and will only provide information regarding your investment transactions from 2 March 2015. Please note that a different pin and password are required.

STEP 3

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.

LOGIN

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@aftribes.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:

I forgot my password?
Please contact the Client Interaction Centre on 0860-65-4444 for assistance.

NEW INDIVIDUAL INVESTOR LOGIN

STEP 4



By clicking on IS Online Services Login you will be directed to this page. Tick the Agree to terms and conditions box.

The screenshot shows the Investment Solutions login page. At the top, there is a header with a world map icon on the left and the 'Investment Solutions' logo on the right. Below the header, there is a large blue rectangular area with a white border. Inside this area, there is a text prompt: 'Please note that in order to continue you are required to agree to the terms and conditions provided'. Below this text is a checkbox labeled 'Agree to terms and conditions'. At the bottom of the page, there is a small footer with the text: 'Investment Solutions is a Licensed Financial Services Provider. © Investment Solutions Limited. All rights reserved. FAS licence number 711'. An arrow from the text in Step 4 points to the checkbox.

STEP 5

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

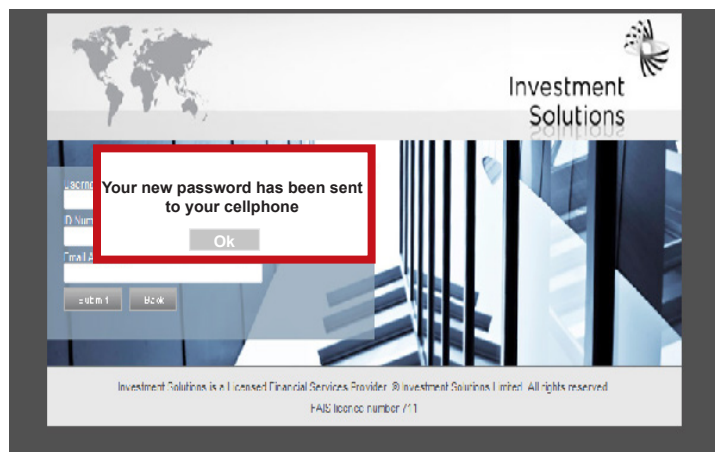
The screenshot shows the Investment Solutions login page with the username and password fields filled in. The 'Username' field contains '12345678' and the 'Password' field contains '12345678'. The 'Generate/Reset Password' button is highlighted with a red box. The rest of the page layout is the same as in Step 4.

STEP 6

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

The screenshot shows the Investment Solutions login page with the username, ID number, and email address fields filled in. The 'Username' field contains '12345678', the 'ID Number' field contains '12345678', and the 'Email Address' field contains '12345678@123.com'. The 'Submit' button is highlighted with a red box. The rest of the page layout is the same as in Step 4.

NEW INDIVIDUAL INVESTOR LOGIN



STEP 7

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: ISH Web: Your temporary password is *****, It will expire in 15 minutes. Contact your adviser on 0860 333 316.*

STEP 8

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.

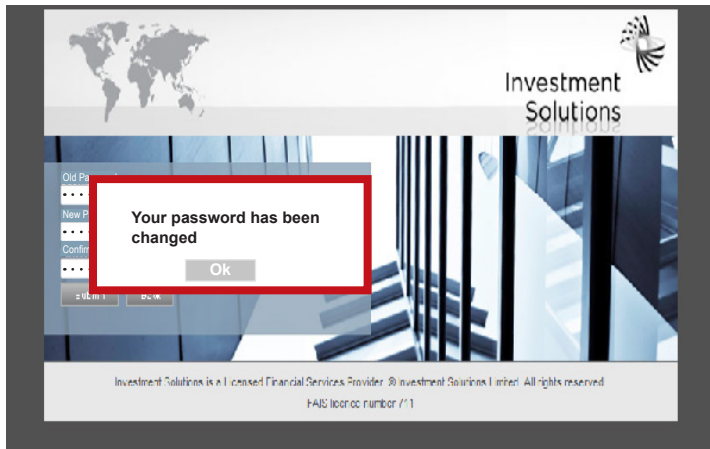


STEP 9

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



NEW INDIVIDUAL INVESTOR LOGIN



STEP 10

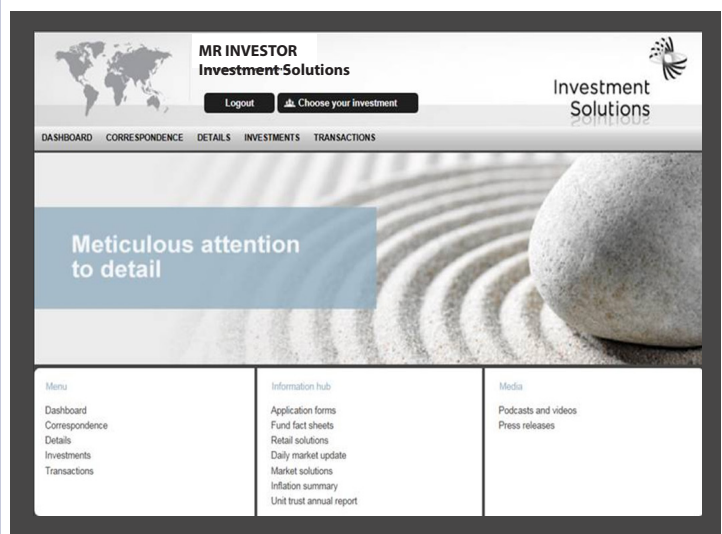
The following message will be displayed:
"Your Password has been changed." Select **Ok**.

NB: An SMS will be sent confirming that the user has logged-in to the system and the password has been successfully changed: ISH Web: You have successfully logged in and changed your password. Contact your adviser or us on 0860 333 316.

STEP 11

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

Please note that the default landing page will always be **"LOCAL"** and to view your offshore investment click on **"Choose your investment"**



STEP 12

By clicking on **"Choose your investment"** you will be able to view your **"local"** and **"offshore"** investments.

