Getting the most from

Your EQ Portal

Simply keep track of all your assets online

Introducing your EQ Portal

The EQ Portal offers a clear view of all your assets online. It shows how your investments have performed, provides a full transaction history and allows you to see assets that we manage alongside other assets that you own.

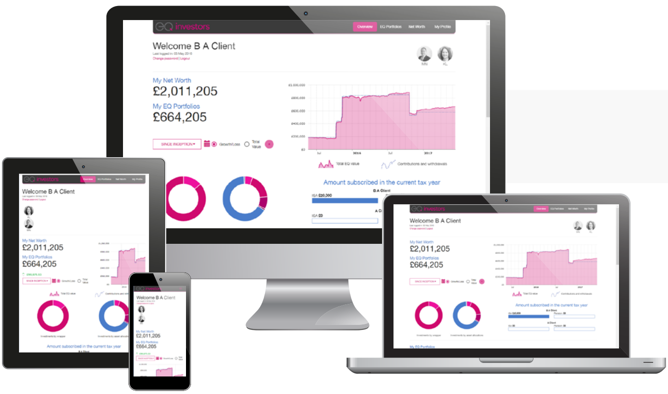
You can access the portal via your browser on mobile, tablet or desktop computer.

We hope that you find the EQ Portal intuitive and easy to use, and we welcome any feedback or suggestions you may have on how we can further improve your online experience.

Warm regards,

Nath Papadacis

Head of Technology



Logging in

To log in to your EQ Portal click:

clientportal.eqinvestors.co.uk

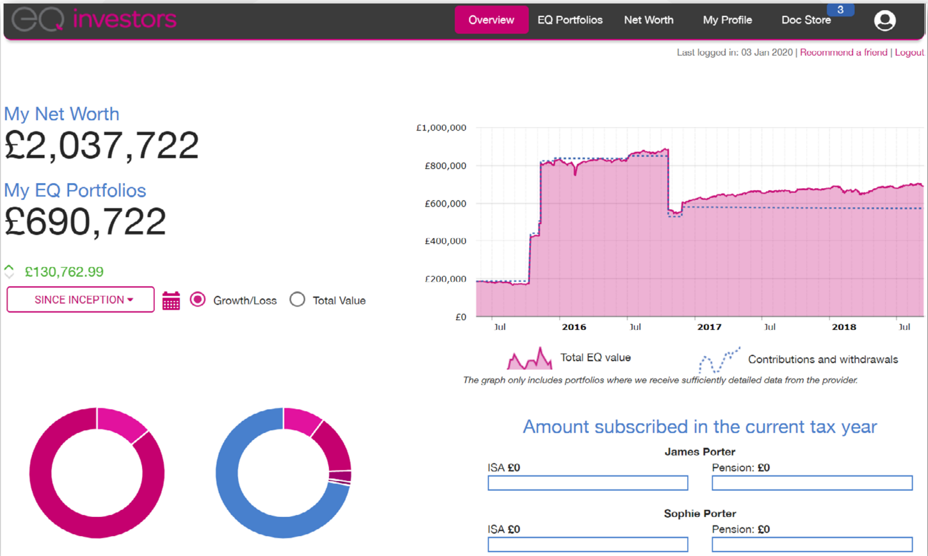
Create an app shortcut

It's simple to set up a shortcut for direct access to the EQ Portal on your mobile. Visit the link above and click the share button (on iOS) or open your browser menu ⋮ (on Android). Then select 'Add to Home screen'.

Dashboard

When you log in you'll see an overview of your account showing:

- Your total wealth
- The funds we manage
- Your overall investment performance
- How much you have subscribed to ISAs and pensions this year.



Security

Keeping your personal data safe is critical in our online world. The EQ Portal implements bank-level internet security, including:

Strong encryption

The portal uses secure encryption, indicated by the padlock symbol in your browser address bar when you log in.

Last logged in date

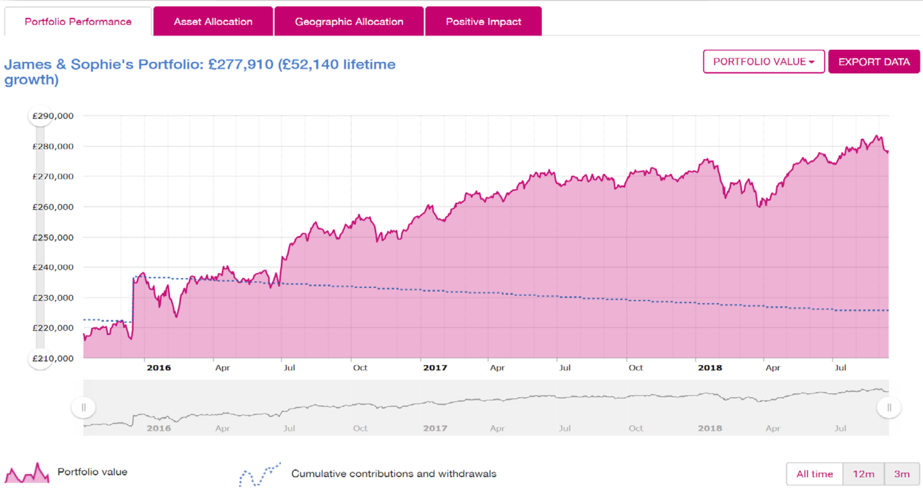
The time and date of your last login is displayed in the top right corner of the page.

Auto-logout

You will be logged out automatically after a period of inactivity.

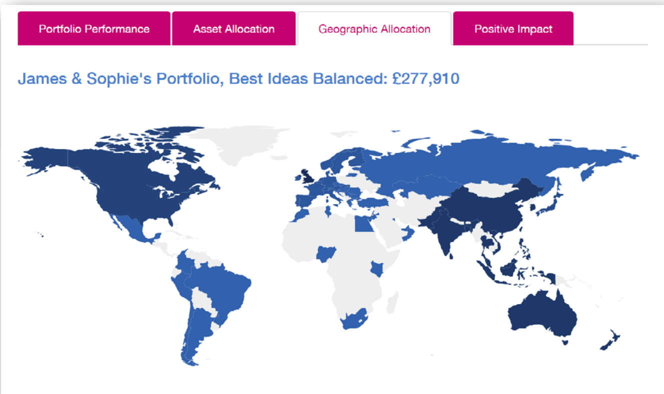
Performance

Performance is updated daily. Click on any of your portfolios to see an interactive chart showing investment performance, contributions and withdrawals. Use the sliders to zoom in on any period.



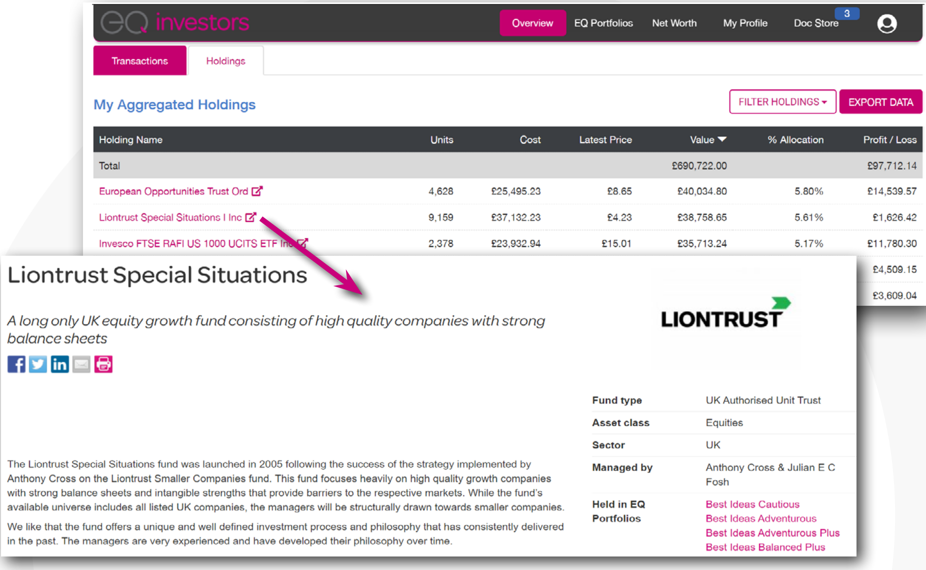
Allocation

You can quickly visualise the diversification and global reach of your portfolio. You can also see the funds and specific percentages we use to build your portfolio.



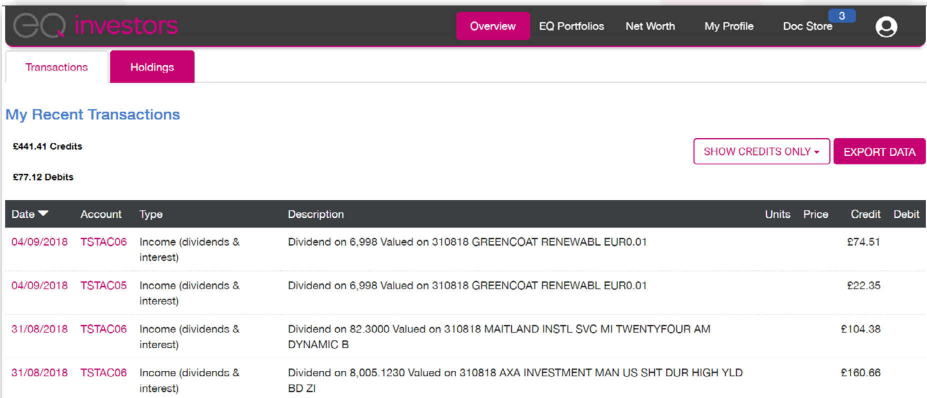
Investment insight

You can drill down into more details on the funds in your portfolio with performance data and links to the factsheets.



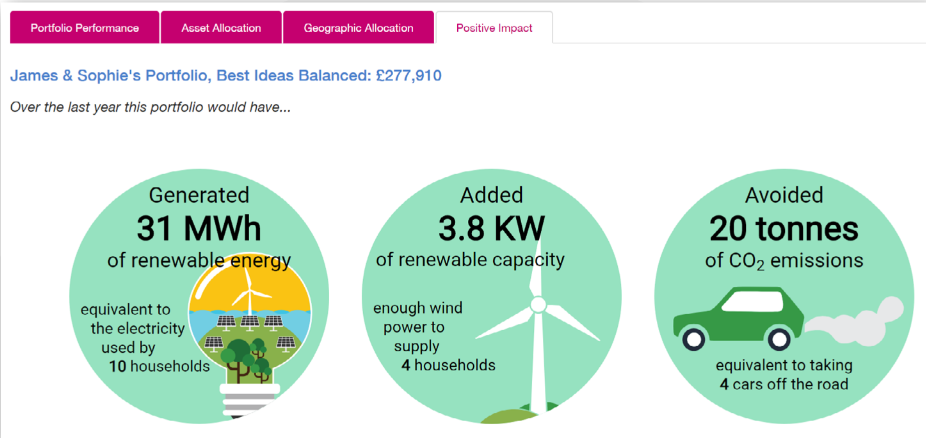
Filtering transactions

There are a number of different ways to filter the information. For example, you can filter transactions to show income received or fees paid.



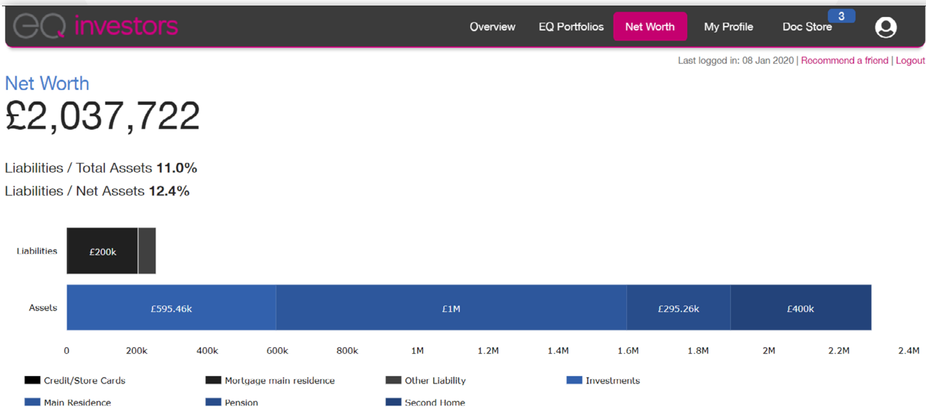
Positive Impact

If you're invested in one of our Positive Impact portfolios, we'll provide a breakdown of the impact your investments have made over the last twelve months.



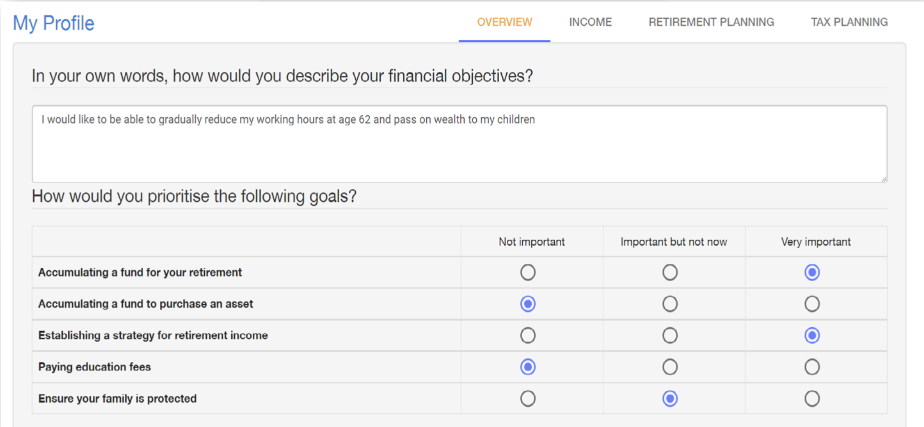
Personal Balance Sheet

This summary shows what you own (assets) and what you owe (liabilities), offering a convenient snapshot of your wealth. You can add and delete entries, and export the data as a CSV file.



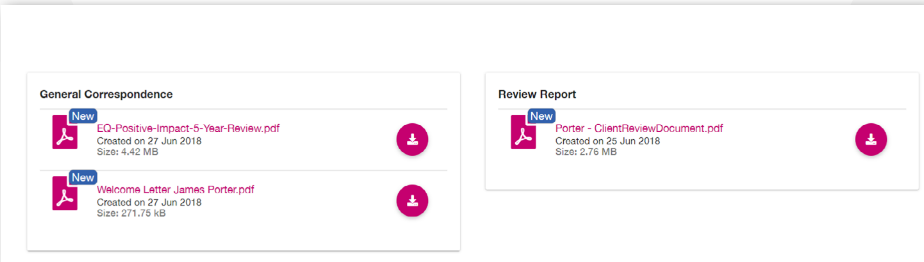
My Profile

Here you can review the information we have about you, and update any of these details if your circumstances change. If you do make any changes, then your EQ planner will be informed straight away.



EQ Vault

The EQ Vault allows us to send you correspondence and valuations securely online.



From February 2020 we will use the EQ Vault to deliver all quarterly valuation statements digitally by default. We estimate that this will save 40,000 printed pages per year! If you would still like to receive these regulatory communications by post, you can opt out of paperless delivery by clicking the Account icon on the main menu and selecting 'Communication Preferences'.

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clientportal.eqinvestors.co.uk

Having trouble logging in? Please get in touch and we'll be happy to help.

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