



ELECTRONIC ON-BOARDING INSTRUCTIONS

Thank you for showing interest in the Interactive managed investment portfolios.

Please click on the link at the bottom of the page to **begin the electronic on-boarding process** of your new investment account.

Steps

- 1** Once the link has been opened the new page will prompt you to register with a cell phone number and create a password.
- 2** A WhatsApp message will be sent to your phone to activate on-boarding of your account.
- 3** Re-type username and password when the page reloads on to login page.
- 4** Complete each step of the form. When a step is completed, a green tick will display in the menu bar. All steps need to be completed correctly for your account to open
- 5** Special instruction: (see section on beneficial owner declaration of status instruction below)

Special Instruction

- **Go to Part B: Beneficial owner**
- a. Fill in name and surname
 - b. Do not fill in entity number
 - c. Nature of person / entity – (select individual)
 - d. Under the **section PART C: Exemption - click option Par (I)** – “ any person insofar as the dividend constitutes income of that person (i.e. falls into normal tax system):”
 - e. Complete and confirm declaration

If you have an issues with your electronic on-boarding please contact your investment consultant for assistance.

Electronic on-boarding link

<https://forms.dma.co.za/form-link/186>