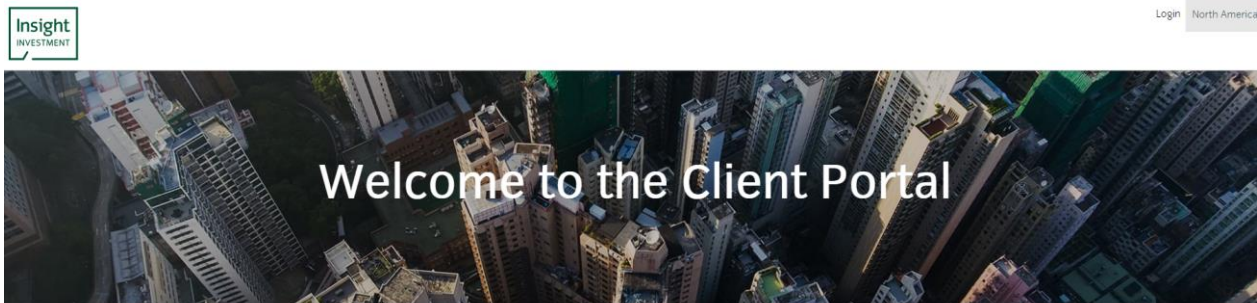


December 2023

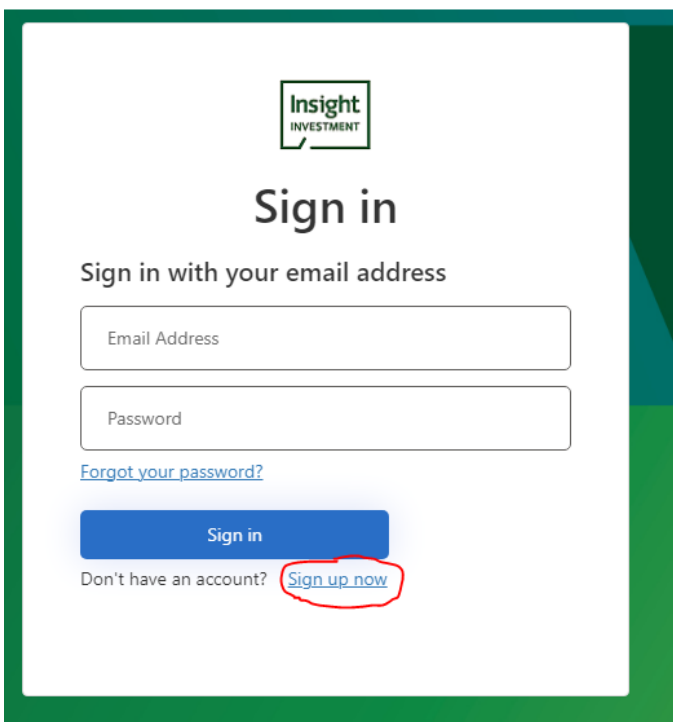
CLIENT PORTAL REGISTRATION GUIDE

SEE STEPS BELOW TO REGISTER

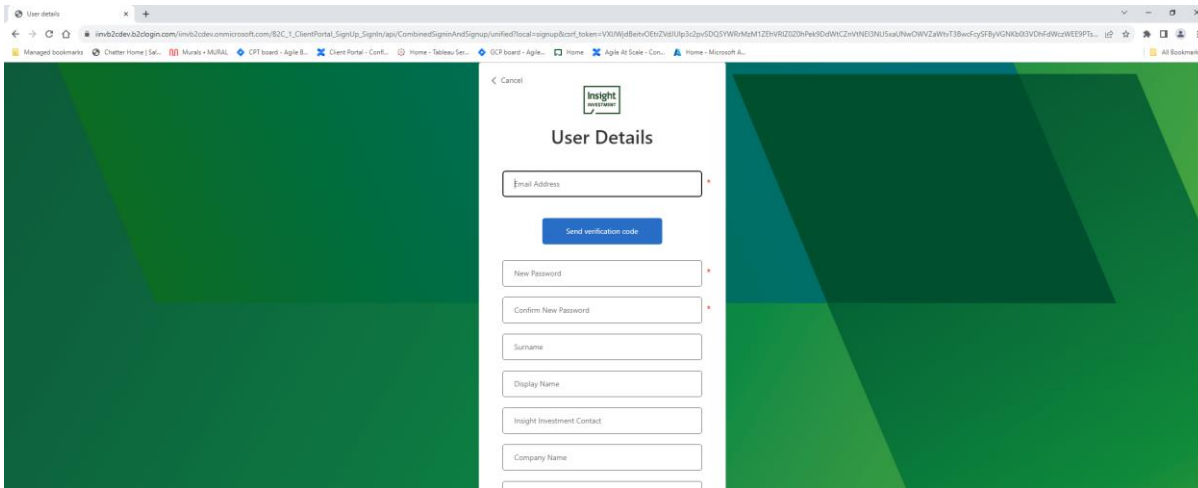
1. Navigate to login page and click 'Log in or register' button



2. When the "Sign In" pop-up window appears, click the 'Sign up now' link shown below:

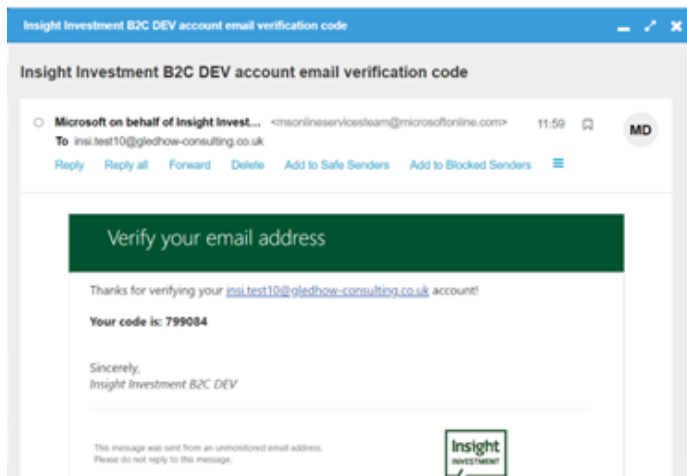


This will open the Registration page where you can enter your User Details.



3. Enter your email address and click **'Send verification code'**. You will be sent an email which contains a verification code.

This is an example of the verification code email you will receive:

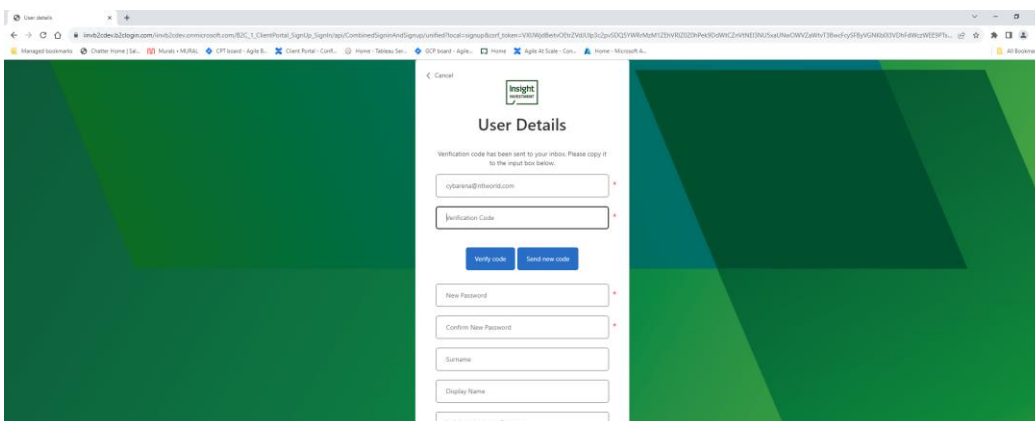


If you don't receive this email, check:

- a) you have entered your email address correctly
- b) your junk mail folder

If you still haven't received it, you can then request a new verification code by clicking the 'Send new code' button

4. Enter the verification code from the email into the User Details screen and click **'Verify code'**



5. Now enter the remaining fields as appropriate and click 'Create'

A registration form with a blue 'Change e-mail' button at the top left. Below it are two password fields, each with a red asterisk on the right. The form includes the following text input fields: Surname, Display Name, Insight Investment Contact, Company Name, Given Name, and MobilePhoneNumber. A blue 'Create' button is located at the bottom center.

You will now be presented with the QR code which will allow you to verify your identity using your mobile phone.

A mobile app verification screen for Insight Investment. At the top left is a '< Cancel' link. The Insight Investment logo is centered at the top. Below the logo, the text reads: 'Download the Microsoft Authenticator using the download links for iOS and Android or use any other authenticator app of your choice.' This is followed by two buttons: 'GET IT ON Google Play' and 'Download on the App Store'. The text continues: 'Once you've downloaded the Authenticator app, you can use any of the methods below to continue with enrollment.' Underneath, it says 'Scan the QR code' and 'Using your app scan this QR code and click "Continue"'. A large QR code is displayed in the center. Below the QR code are two links: 'Can't scan? Try this' and 'Still having trouble?'. At the bottom center is a blue 'Continue' button.



You should open the Microsoft Authenticator App up on your mobile phone



Within the app, click the plus + symbol shown in the top right-hand corner



Choose 'Add Personal Account'




You will be presented with a choice of entering details manually or scanning a QR code. Choose 'Scan a QR code' and point the camera of your device at the QR code on the page and the site 'Insight Investment B2C' will be added to the list of sites in your authenticator app.

6. On your computer you should now click **'Next'**

7. Enter the 6 digits shown for the 'Insight Investment B2C' site with your mobile app into the next page and click **verify**.

< Cancel

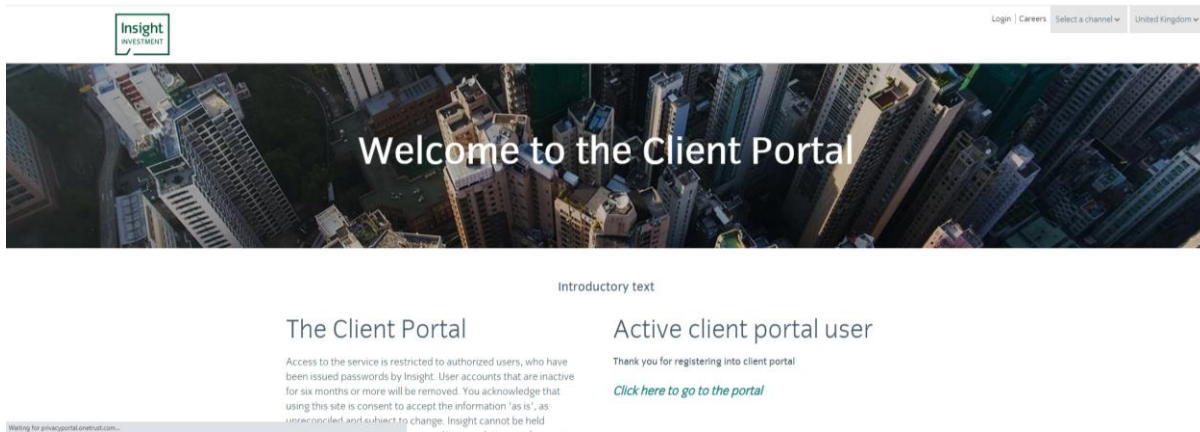


Enter the verification code from your authenticator app.

 *

Verify

If your registration is successful, you will see the following page, 'click here to go to the portal' will take you straight to your Portal Homepage:



If you see the 'Registration request is pending' message, then we will review your registration request and update you by email when it has been processed.

