

# Help for Investors Using ShareReg Web Based Share Portal

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## Registration

### Navigate to the Registration Page

- To register to use our Web Based Share Portal please click the Register link in the Account Log in section at the left side of our homepage. Then you can follow the 3 steps below to register.

### Step 1 - Select the company you have shares with

- **Private Investor/Corporate Investor** – Please select whether you are a private investor or a corporate investor.
- **Investor ID** - You can find it on a recent share certificate/dividend tax voucher issued by Share Registrars. It may be called 'Holder No.' in some share certificates/dividend tax vouchers. If your latest share certificate/dividend tax voucher was issued by a different Registrar, please contact us and we can help you with the registration.
- **Company Name** - Please click the drop down list to select the name of our client company with whom you hold your shares. If the company you are looking for is not on the list, it may be that the client company has chosen not to offer its shareholders the services provided by the Share Portal. In that case, you can not register.
- **First Name(s)/Company Name** - This is your first name and middle name, if any, as shown on the share certificate/dividend tax voucher if you are a private investor or your full company name if you are a corporate investor.
- **Last Name** This is your first name and middle name, if any, as shown on the share certificate/dividend tax voucher if you are a private individual. A corporate investor should leave this field blank.
- **Your UK Post Code** - Please provide your post code if your registered address for your holding is in the UK, otherwise please tick the 'I do not have a UK post code' flag to indicate that you do not have a UK post code.

### Step 2 - Setup your online account

- **User Name** - Please create a user name. No space is allowed in the user name.
- **Password** - Your password should have at least 8 characters, including at least 1 capital letter and 1 numeric digit.
- **Email** - Please enter an email address for receiving information about your registration.
- **Date of Birth** - Please enter your date of birth. This is for security purpose only in case that you forget your user name or password.
- **Security Questions and Answers** - Please select 3 security questions and remember the answers that you provide. These will help you retrieve your user name or password if necessary.
- **Legal Terms Accepted** – To View the Legal Terms please click the Legal link at the bottom of the page. Please tick this flag if you fully understand and accept the legal terms for registering at our website and using the Share Portal.
- Then you can click the **Create Account** button to complete the registration.
- Once the registration is complete, a confirmation message is displayed on the screen and a web activation code will be posted to your registered address within seven days.

### Step 3 – Activation

- Once you receive your web activation code, you can activate your registration at the Share Portal. To do so please go to the Login page at our website to enter your user name and password first.

- At the next page you are required to enter the web activation code. After the code is entered and verified a confirmation message is displayed on the screen.
- The login page then appears automatically, where you can enter your user name and password again.
- After that, the Share Portal default page is displayed on the screen.

## Use the Share Portal

### Navigate the Share Portal

- The Share Portal screen has a navigation pane at the left and a details section at the right. By clicking different menu items in the navigation pane, you can navigate to different pages to access the services that the Share Portal provides, which are explained below.

### View Portfolio

- This page is the default page when you log in. You can always return to this page by clicking the “My Holdings” menu item in the navigation pane.
- If you have just registered, the holdings you hold under the investor ID that you use for registration are displayed.
- You can go to the Add Holdings page to add other holdings (if any) by clicking the Add Holding button on the page.

### Add Holdings

- Your first name and last name (if you are a private individual) or company name (if you are a corporate body) and post code details are displayed automatically when you open up this page. If the name and post code of the holdings to be added are different from those displayed on screen please contact us to have the details amended before you can proceed to add the holding.
- If you are sure the details do match please select the company name of your holding and enter the investor ID for your holding.
- After that please click the Add Holdings button on the page. A message will be displayed on the screen confirming the addition is successful.

### My Dividends

- On this page, all of your dividends are listed. The latest dividends are displayed first.
- By default, all your dividends are displayed. You can select dividends paid to a specific investor account ID by selecting that investor account ID at the Accounts dropdown menu.

### My Meeting Votes

- To navigate to a particular meeting please select your holding in the holdings dropdown menu.
- Then select the meeting in the meetings dropdown menu.
- The meeting votes list is displayed on the screen.
- You can see how many votes you are entitled to and the latest time that you are allowed to vote on the screen.
- The default proxy is the chairman of the meeting. If you would like to appoint any other person as your proxy, please check the radio button before the text Name and enter the person’s name in the box to the right. You can then click the Update button immediately below to submit the name of your proxy.
- To change the number of votes for a resolution, please click the Edit button next to that resolution. You can then enter the number of votes (up to the number that you hold) and click the Update button to submit your votes.
- Tip: if you would like to assign all of your entitled votes to a particular vote type, you can select the type in the Assign All To dropdown menu and then click the Update button. Your votes will be automatically added under that vote type.

## Contact US

- If you would like to contact us you can enter and submit your message in this page.

## Personal Details

- On this page, you can view your registered address, communication preference, telephone number, email address for electronic communications, and name(s) of joint holders (if any).
- To view the personal details for difference investor accounts, please select the account in the Accounts dropdown menu.
- You can click the Change Details link to change your personal details.

## Change Details

- In this section, you can change your address, select your communication preference and provide the email for electronic communication.
- Please note that if you hold your shares in the CREST system through a CREST sponsor you need to contact your CREST sponsor to change your address.
- If you change your communication preference to Electronic, it is mandatory that you provide a valid email address in the Email for Electronic Communication box.
- Please note that any update will apply to all your holdings registered on the Share Portal.

## Change Bank Details

- You can set up or change how you would like to receive your future dividend or interest payments on this page.
- The payment method can be cheque, bank mandate, or 3<sup>rd</sup> party warrant (a 3<sup>rd</sup> party warrant authorises us to make and post the payment to a 3<sup>rd</sup> party).
- If you choose to be paid by cheque, you do not need to provide any further detail.
- If you choose to be paid by bank mandate, you need to provide your bank name, account number, and sort code.
- If you choose to be paid by 3<sup>rd</sup> party warrant, you need to provide the 3<sup>rd</sup> party's name and address.

## Change Password

- On this page you can change your password by entering your old password and new password.
- We recommend that you change your password regularly to keep your Share Portal login secure.

## Logout

- Please click the Logout link in the navigation pane to safely log out of the Share Portal.
- Please keep your Share Portal login secure. It is very important that you log out once you finish using the Share Portal.

## Unable to Log in

### Forgot Your User Name

- To retrieve your user name please navigate to the Login page and click the Forgot Your User Name link.
- At the next page please enter the email address you provided at registration and one of the investor IDs in your Share Portal portfolio.
- At the next page please enter your date of birth and answers to the security questions. Then please click the Submit button. If the information you provide is correct your user name is displayed on the screen.
- If you registered before our recent Share Portal upgrade you were not asked to provide your date of birth at that time. In that case you will not be required to provide your date of birth when retrieving your

user name. However, once you have retrieved your user name successfully you will be required to provide additional information including your date of birth. Please follow the instructions on the screen to provide the additional information. After you provide the additional information, a web activation code will be sent to your address by post. You will then need to log in again and enter the web activation code to reactivate your log in.

## **Forgot Your Password**

- If you forget your password you can reset it on our website. First you need to navigate to the Login page and click the Forgot Your User Password link.
- At the next page please enter your user name and date of birth.
- Once your user name and date of birth are verified, you are required to enter the answers to the security questions that you have set up.
- If the answers are correct a new password is sent to the email address you provided at registration.
- You can then use the new password to log in and change the new password to a new password of your own choosing.
- If you have registered before our recent Share Portal upgrade you were not asked to provide your date of birth at that time. In that case you will not be required to provide your user name when resetting your password. However, once you reset your password successfully, you will be asked to provide additional information including your date of birth. Please follow the instructions on the screen to provide the additional information. After you provide the additional information, a web activation code will be sent to your address by post. You will then need to log in again and enter the web activation code to reactivate your log in.

## **Still Unable to Log in**

- If you are unable to retrieve your user name or reset your password, or for any other reason you are still unable to log in please contact us by phone or email.