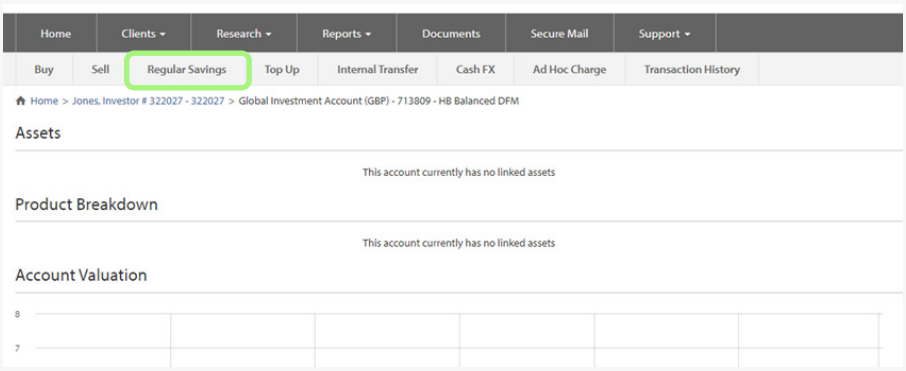
The smart investment platform

How to set up a regular investment - GIA

User Guide

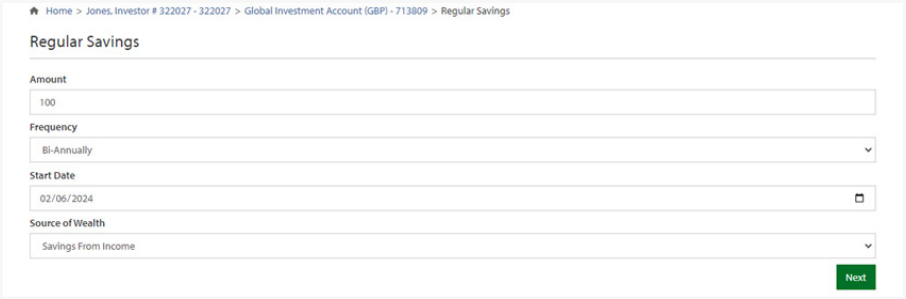
Regular Savings Process

This guide will detail the steps required to set up a Regular Savings Instruction using the online portal.



Step 1

Select the Regular Savings option at the top of your account page.



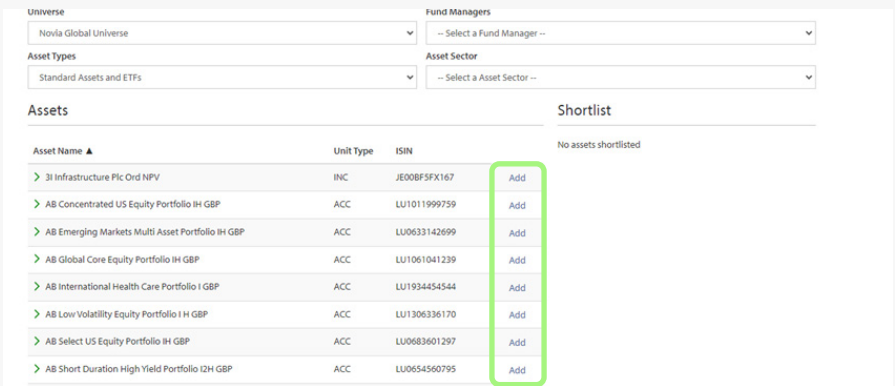
Step 2

Please enter the amount, frequency, start date and source of wealth of your payment. (Please note we call payments made twice a year Bi-Annual Payments)



Step 3

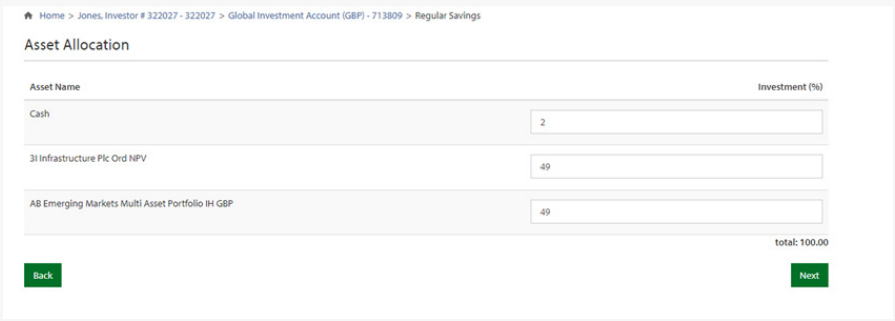
Next, fill in your adviser's initial charge amount.



Step 4

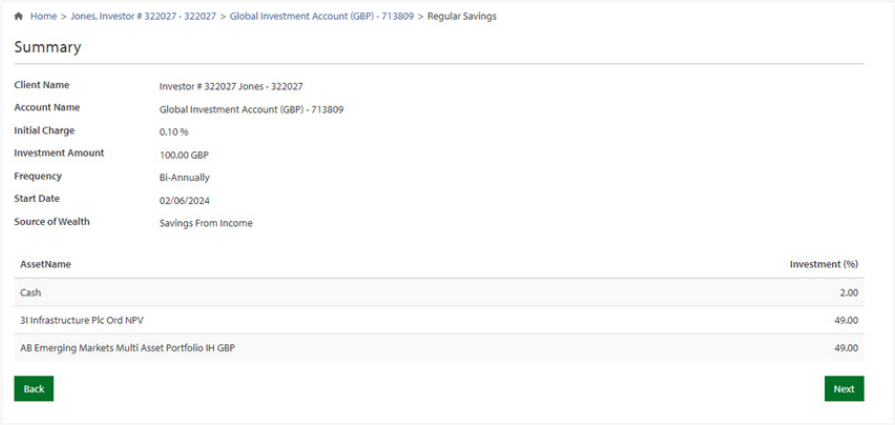
On the next screen you will be presented with asset options for your payment, please select a shortlist of investments.

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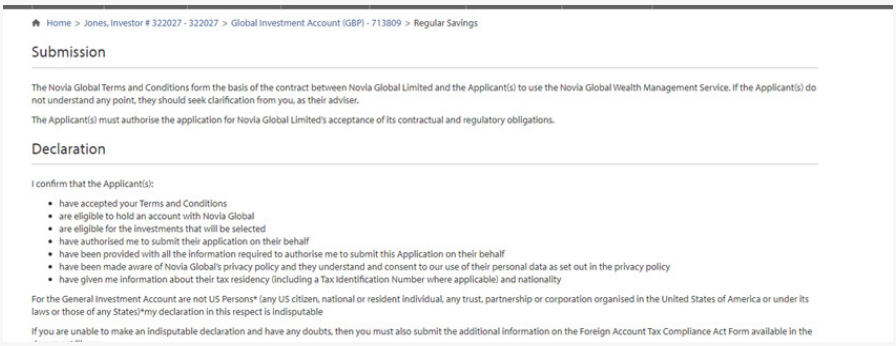
Step 5

Once you have chosen your assets, please provide a percentage allocation for each. (Please note that an allocation of 2% in cash is non-optional)



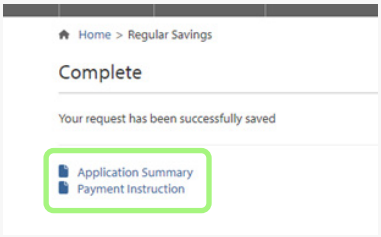
Step 6

Next you will be provided with a summary of your intended payment instruction.



Step 7

Once you are happy with your payment instruction, proceed to the Submission and Declaration page. Please read it carefully and submit.



Step 8

Your Regular Savings Instruction is complete. On the final page you can view the "Application Summary" and "Payment Instruction" Documents. Please download them for your records.

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