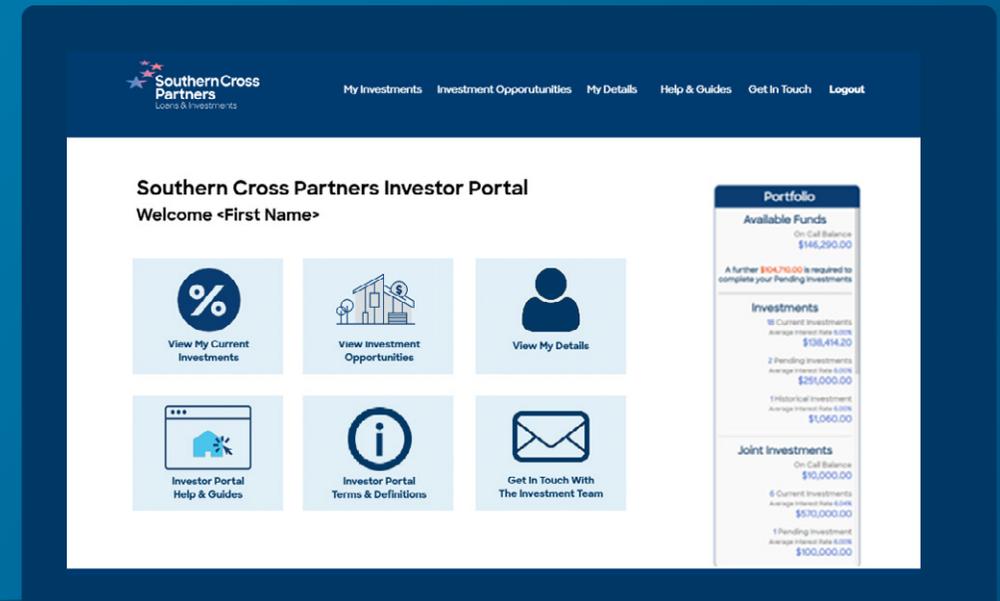




Investor portal 'how to' guide



Updating your details



1

Log into the investor portal with your **Client ID** and **password**.

Click **Sign In**.

2

Navigate to the **My Details** section.

You can do this by clicking the **View My Details** tile.

Or by clicking **My Details** in the navigation bar along the top of the portal page.

The image displays two screenshots of the Southern Cross Partners investor portal. The top screenshot shows the login page with a navigation bar at the top containing links for Home, Investments, Loans, Financial Advisors Information, About Us, Contact, and Investor Login. The main content area features a large banner with the text 'PARTNER WITH US THE INVESTMENT CHOICE IS IN YOUR HANDS' and a 'Sign In' button. A login form is overlaid on the banner, with fields for 'Client Id' and 'Password', and a 'Sign In' button. The bottom screenshot shows the 'My Details' section of the portal. The navigation bar at the top includes 'My Details' which is highlighted. The main content area displays a grid of tiles: 'View New Opportunities', 'View My Current Investments', 'View My Details' (highlighted), 'Investor Portal Terms & Definitions', 'Investor Portal Guides', and 'Contact the Investment Team'. On the right side, there is a 'Portfolio' section with 'Available Funds' (\$30,000.00), 'Investments' (Average Interest Rate 7.00%, \$100,000.00), and various charts for 'Investments by LVR', 'Investments by Type', and 'Investments by Region'.

3

In this section you can update your contact information, your address details, or your withholding tax details.

Note:

Any changes made in the **My Details** section need to be approved by a member of our team.

The screenshot displays the 'My Details' page for a user named 'Demo TEST'. The page is organized into several sections:

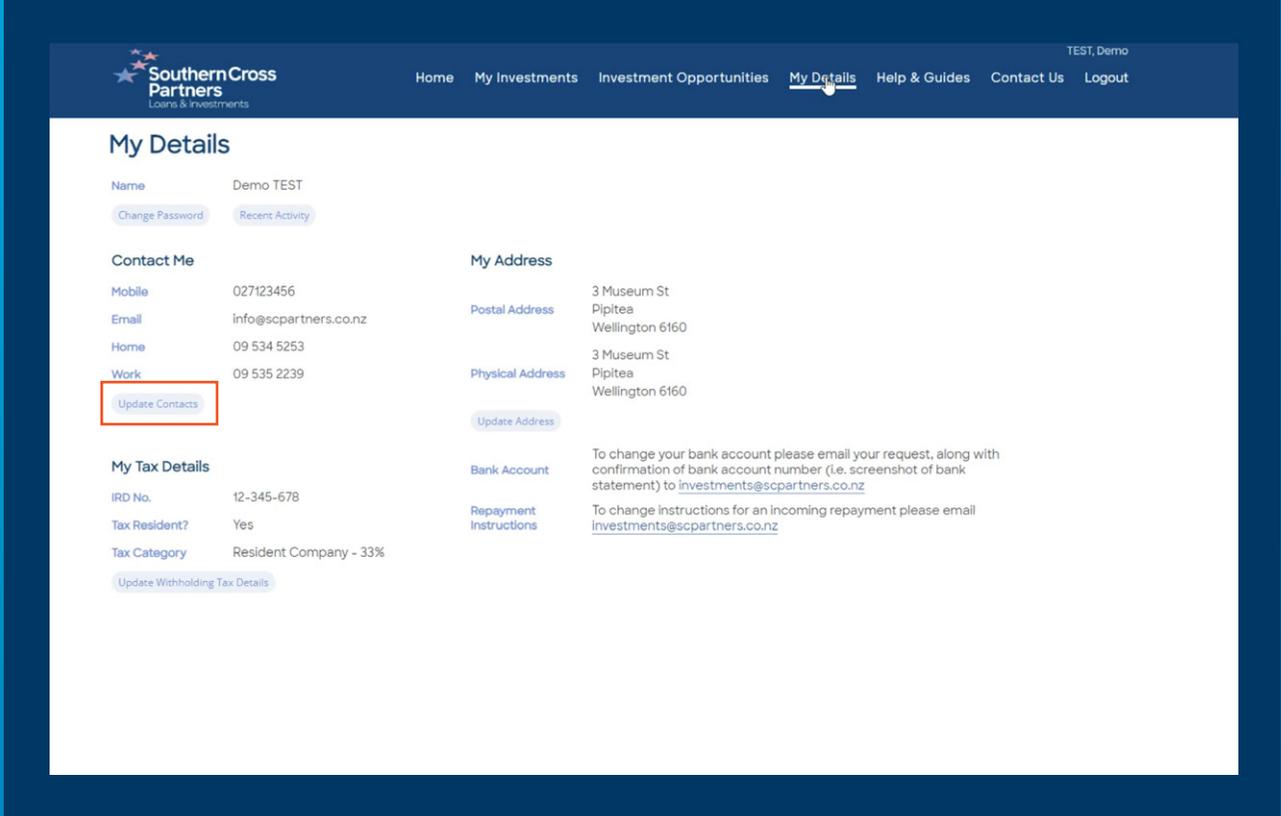
- Name:** Demo TEST. Includes buttons for 'Change Password' and 'Recent Activity'.
- Contact Me:** Lists Mobile (027123456), Email (info@scpartners.co.nz), Home (09 534 5253), and Work (09 535 2239). Includes an 'Update Contacts' button.
- My Address:** Shows both Postal and Physical addresses as '3 Museum St, Pipitea, Wellington 6160'. Includes an 'Update Address' button.
- My Tax Details:** Lists IRD No. (12-345-678), Tax Resident? (Yes), and Tax Category (Resident Company - 33%). Includes an 'Update Withholding Tax Details' button.
- Bank Account:** Includes instructions for changing bank accounts and repayment instructions, both pointing to investments@scpartners.co.nz.

The page header includes the Southern Cross Partners logo and navigation links: Home, My Investments, Investment Opportunities, My Details (active), Help & Guides, Contact Us, and Logout. A 'TEST, Demo' label is visible in the top right corner.

4

To update your contact information, navigate to the **Contact Me** section and click the **Update Contacts** button.

A pop out box will appear.



The screenshot displays the 'My Details' page on the Southern Cross Partners website. The page is divided into several sections:

- Name:** Demo TEST. Includes buttons for 'Change Password' and 'Recent Activity'.
- Contact Me:** Lists Mobile (027123456), Email (info@scpartners.co.nz), Home (09 534 5253), and Work (09 535 2239). A red box highlights the 'Update Contacts' button.
- My Address:** Shows Postal Address (3 Museum St, Pipitea, Wellington 6160) and Physical Address (3 Museum St, Pipitea, Wellington 6160). Includes an 'Update Address' button.
- My Tax Details:** Lists IRD No. (12-345-678), Tax Resident? (Yes), and Tax Category (Resident Company - 33%). Includes an 'Update Withholding Tax Details' button.
- Bank Account:** Includes instructions for changing bank account details and repayment instructions.

5

In this section you can update your:

- Contact information
- Address details
- Withholding tax details

Note:

Any changes made in the **My Details** section need to be approved by a member of our team.

The screenshot shows a web application interface with a modal window titled "Update Contact Details". The modal contains the following fields:

- Contact Details** (with a help icon)
- Home Phone**: Input field containing "09 534 5253"
- Work Phone**: Input field containing "09 535 2239"
- Mobile**: Input field containing "027123456" with a cursor at the end
- Email**: Input field containing "info@scpartners.co.nz"

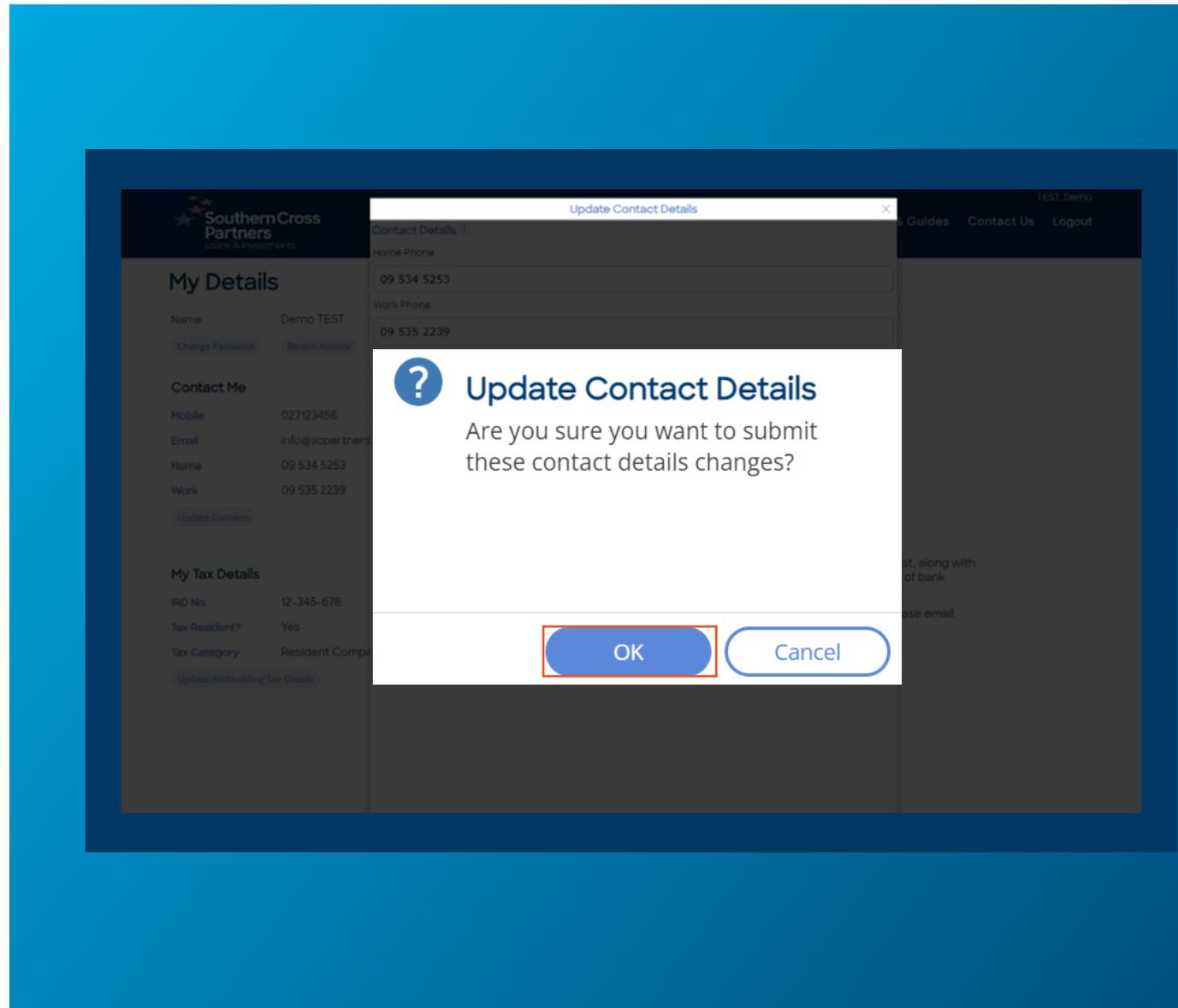
The background shows a dark sidebar with the text "Southern Cross Partners" and "Loans & Investments" at the top. Below that, the word "Details" is visible. Further down, there is a "Demo TEST" section and a "Recent Activity" section. The main content area is partially obscured by the modal window.

6

A pop up box will confirm you want to make these changes.

Click the blue **OK** button.

Your request will be verified by SCP and updated.



7

To update your contact information.

Navigate to the **My Address** section and click the **Update Address** button.

A pop out box will appear.

Southern Cross Partners
Loans & Investments

Home My Investments Investment Opportunities **My Details** Help & Guides

My Details

The following update is awaiting approval:
Mobile: (027) 987 632

Name Demo TEST
Change Password Recent Activity

Contact Me

Mobile	027123456
Email	info@scpartners.co.nz
Home	09 534 5253
Work	09 535 2239

Update Contacts

My Address

Postal Address	3 Museum St Pipitea Wellington 6160
Physical Address	3 Museum St Pipitea Wellington 6160

Update Address

My Tax Details

IRD No.	12-345-678
---------	------------

Bank Account
To change your bank account please email your request, along with confirmation of bank account number (i.e. screenshot of bank statement) to investments@scpartners.co.nz

Repayment
To change instructions for an incoming repayment please email investments@scpartners.co.nz

8

In this box, you can update your physical address including:

- Property name
- Street address
- Suburb
- City
- Region
- Postcode
- Country

To update these, click into the box and enter your details.

In some cases, you will be supplied with options to choose from.

To do this, click the correct option for you.

Once you have entered your details, click the blue **Update** button.

The screenshot shows a web interface for Southern Cross Partners. A modal window titled "Update Address Details" is open, allowing a user to update their physical address. The form includes the following fields:

- Property Name: [Empty text box]
- Street: 10 Downing St
- Suburb: Pipitea
- City: Wellington
- Region: [Dropdown menu]
- Postcode: 6160
- Country: New Zealand
- This is also my Postal Address?

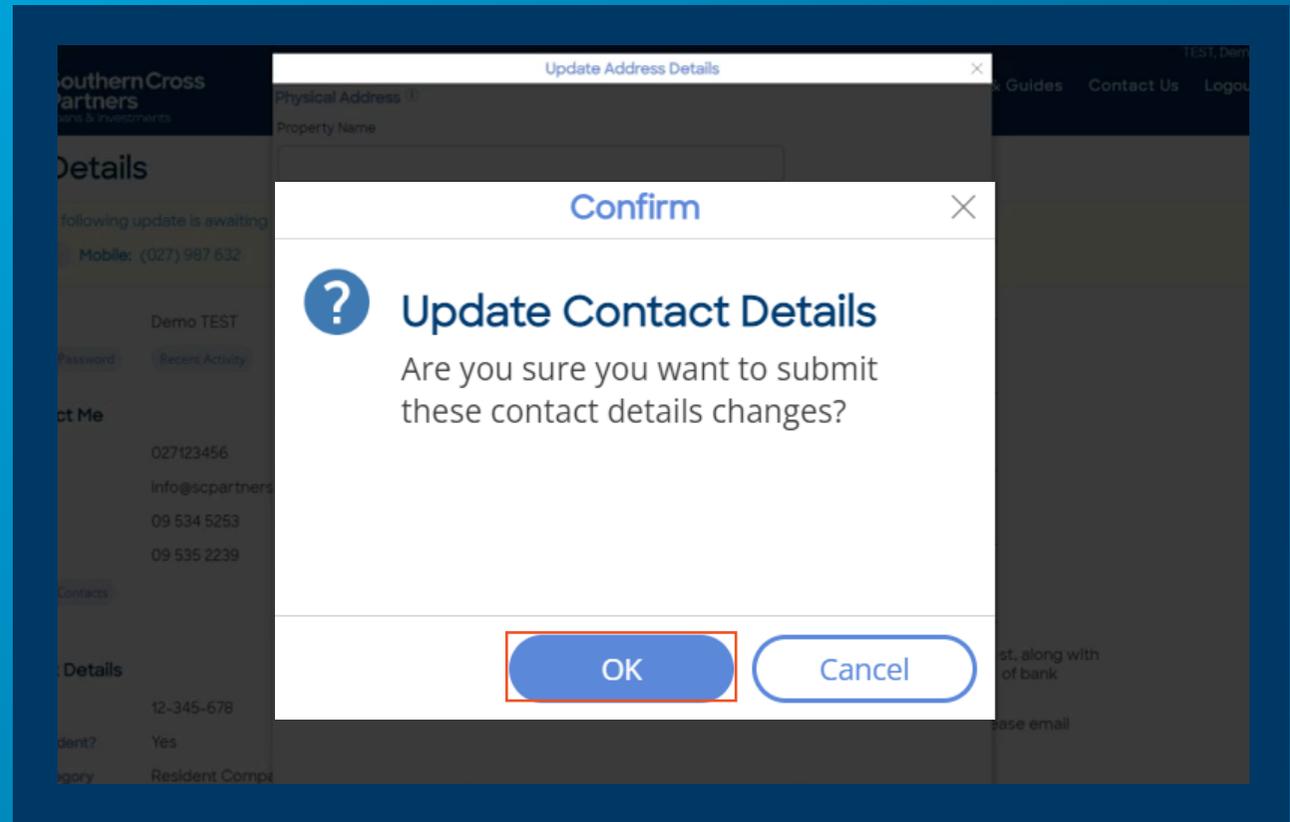
The background page, "My Details", shows the user's profile for "Demo TEST". It includes contact information (Mobile: (027) 987 632) and tax details (IRD No: 12-345-678, Tax Resident?: Yes, Tax Category: Resident Comp). There are links for "Change Password", "Reactivate Account", "Update Contacts", and "Update Withholding Tax Details".

9

A pop up box will confirm you want to make these changes.

Click the blue **OK** button.

Your request will be verified by SCP and updated.



10

In this box, you can update your tax details including:

- IRD number
- Your New Zealand tax resident status
- Your tax category rate

To update these, click into the box and enter your details.

In some cases, you will be supplied with options to choose from. To do this, click the correct option for you.

Once you have entered your details, click the blue **Update** button to save them.

The screenshot shows the 'Update Withholding Tax Details' modal form. The form is titled 'Update Withholding Tax Details' and has a close button (X) in the top right corner. It contains the following fields and options:

- Basic Details**
 - IRD No.: 12-345-678
 - Tax Resident?: Yes (dropdown menu)
 - Tax Category: Resident Company - 33% (dropdown menu)

The dropdown menu for Tax Category is open, showing the following options:

- Resident Low - 10.5%
- Resident Mid - 17.5%
- Resident High - 30%
- Resident Top - 33%
- Resident High - 39%
- Resident Company (Default) - 28%
- Resident Company - 33% (highlighted)
- Resident Exempt

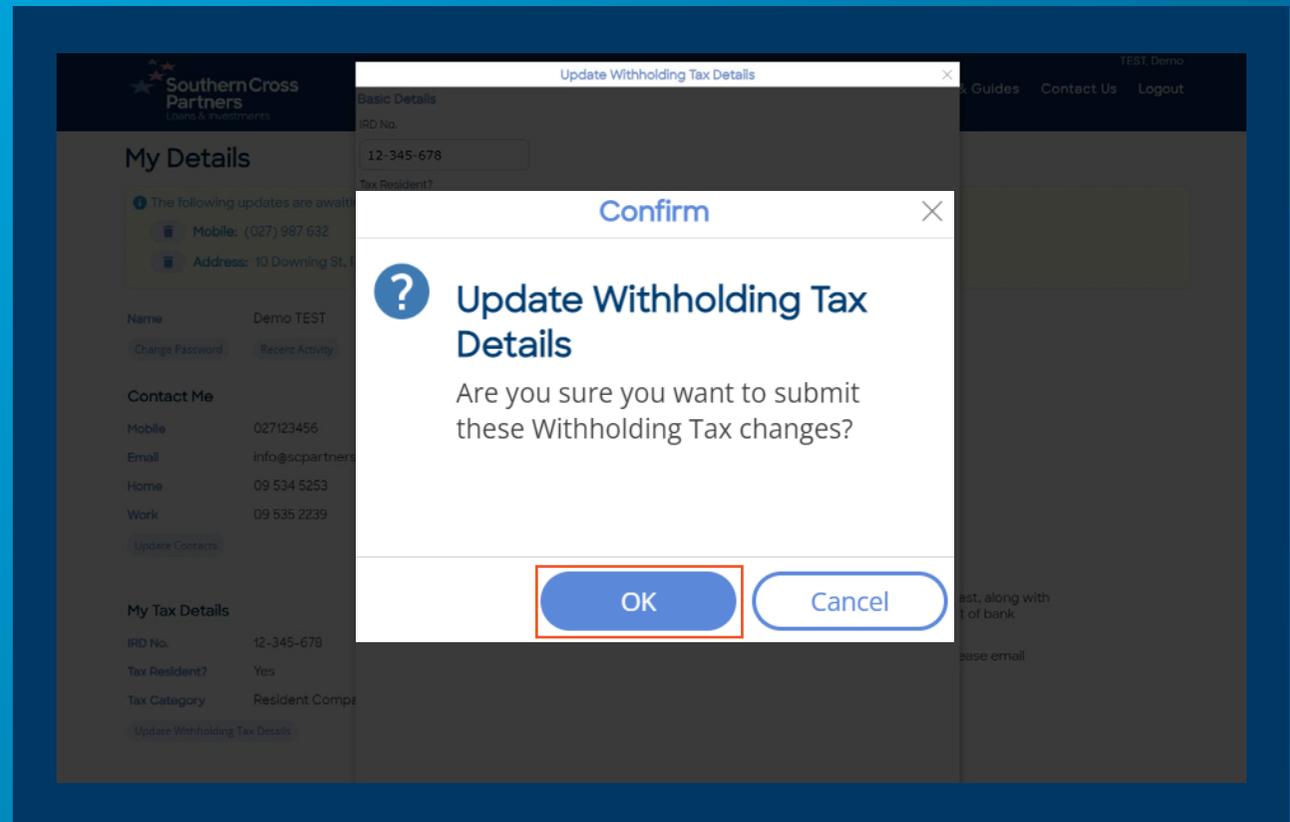
At the bottom of the modal, there are two buttons: 'Cancel' and 'Update'. The 'Update' button is highlighted with a red border.

11

A pop up box will confirm you want to make these changes.

Click the blue **OK** button.

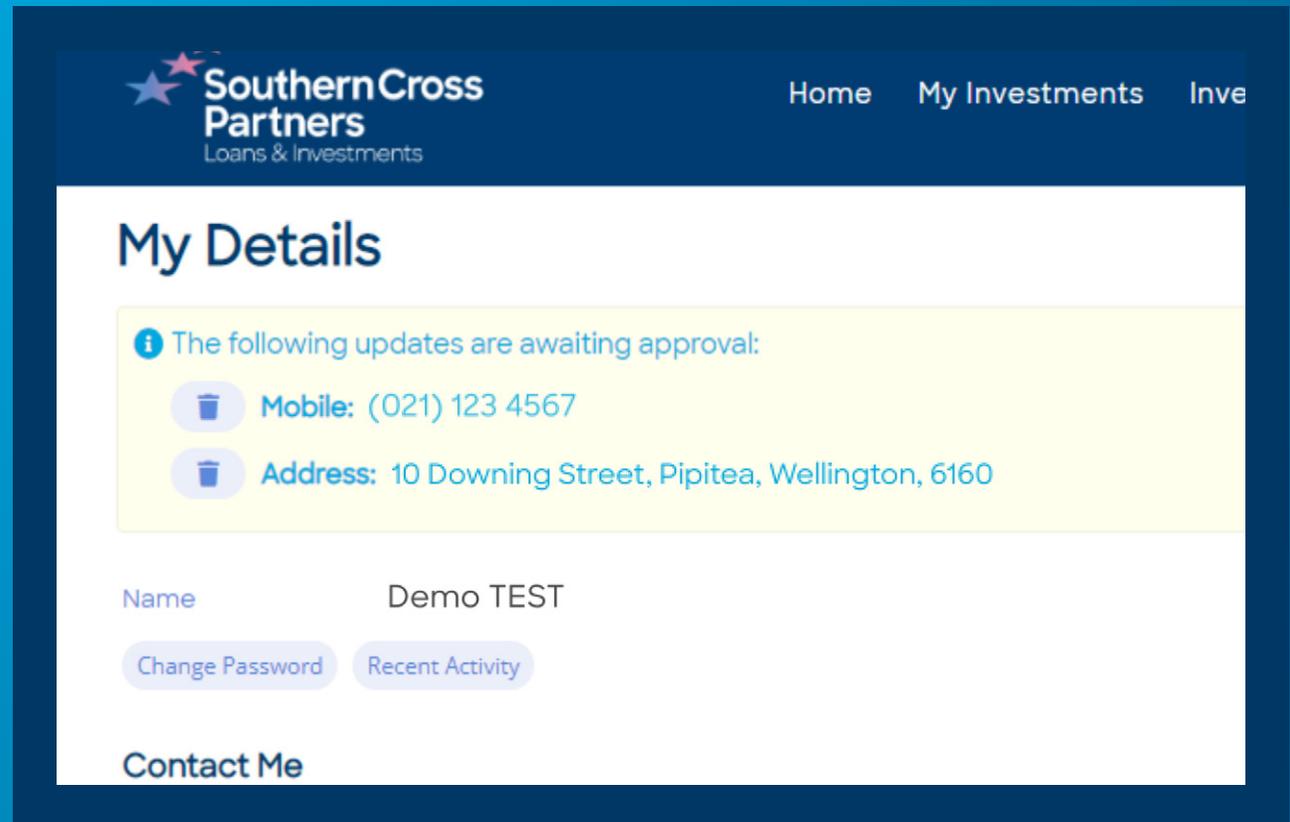
Your request will be verified by SCP and updated.



12

You will see a note in the portal confirming which of your changed details need approval.

Once the details have been verified and updated, it will disappear.



The screenshot displays the 'My Details' page of the Southern Cross Partners portal. At the top, the logo 'Southern Cross Partners Loans & Investments' is visible on the left, and navigation links for 'Home', 'My Investments', and 'Inve' are on the right. The main heading is 'My Details'. A prominent yellow notification box contains an information icon and the text 'The following updates are awaiting approval:'. Below this, two items are listed: 'Mobile: (021) 123 4567' and 'Address: 10 Downing Street, Pipitea, Wellington, 6160', each with a trash can icon. Underneath the notification, the user's name is shown as 'Demo TEST'. At the bottom of this section are two buttons: 'Change Password' and 'Recent Activity'. The page concludes with a 'Contact Me' link.

Can I talk to a real person?

If you have any questions, comments, or feedback, you can call us or send us an email.

0800 00 58 43

investments@scpartners.co.nz

Disclaimer: All investment opportunities are subject to change and subject to availability. Southern Cross Partners Ltd is licensed to provide Peer-to-Peer lending services under the Financial Markets Conduct Act 2013. This content is general in nature only and has not taken into account any particular person's objectives or circumstances. We recommend you speak with a financial adviser before making any investment decisions.

