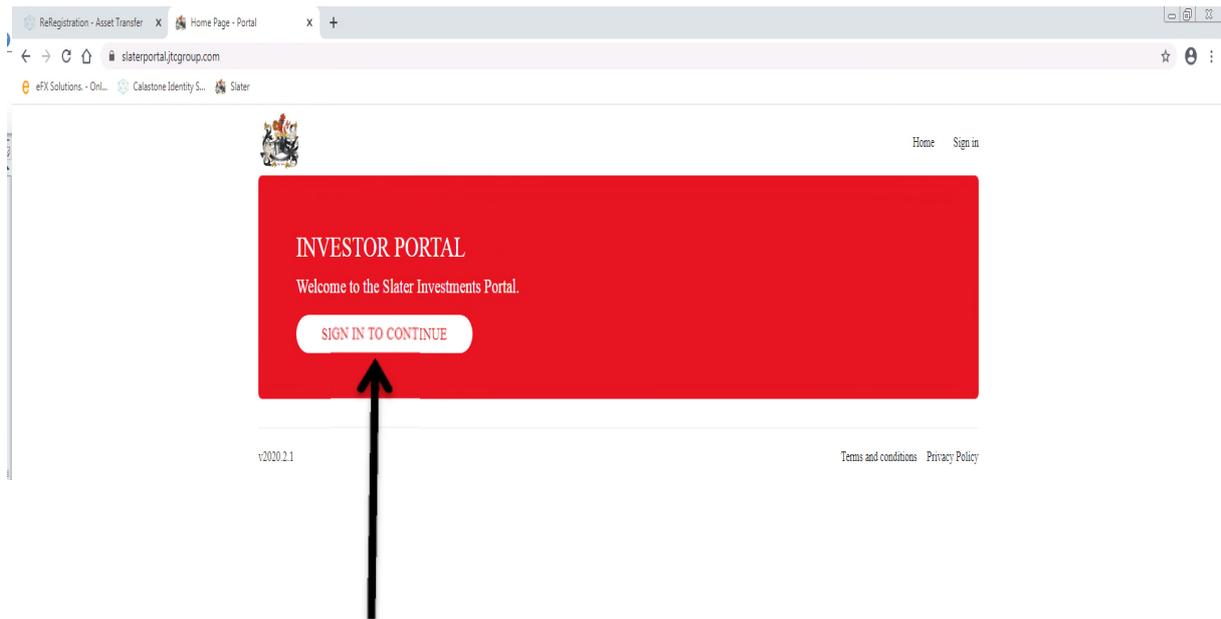


## Slater Investor Portal Log On Guide

Please note we recommend using the following internet browsers to access the Slater Investor Portal: Google Chrome, Microsoft Edge, Opera or Mozilla Firefox.

In order to Log On to the Slater Investor Portal please use <https://slaterportal.jtcgroup.com/> or visit the Slater website and click on the Investor Portal link.

This should bring up the below screen;



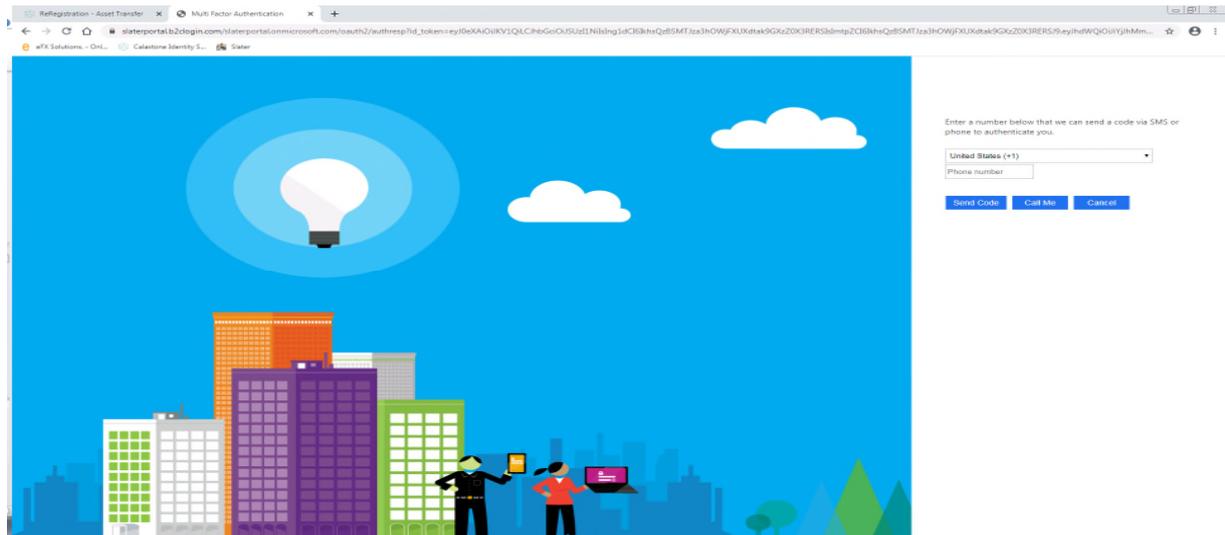
Please now select the “Sign in to Continue” button which will bring up the below screen;



You now need to input the email address quoted in your letter in the top box on the right hand side of the sheet, where you should be able to see in light grey “someone@example.com”. Please note the example will disappear once you start typing in the box.

In the box below where you have inserted your email address, please now insert the Password that was provided to you by us in our separate letter and then select the “Sign in” button.

This should now take you to the below screen;



On this screen we require you to input a phone number you have access too in order to be able to send you a verification code or receive a call to access the portal (*The phone number will be stored so should be one you have regular access to and we would recommend using a mobile number where possible. Please note if you make any changes to your phone number you will be required to contact us in order to update your account details and access the portal.*)

To do this you will need to amend the top box to the Country you will be receiving the call in by clicking on the arrow to the right hand side and then searching in the drop down menu.

Then in the box below please insert the phone number you wish to be contacted on.

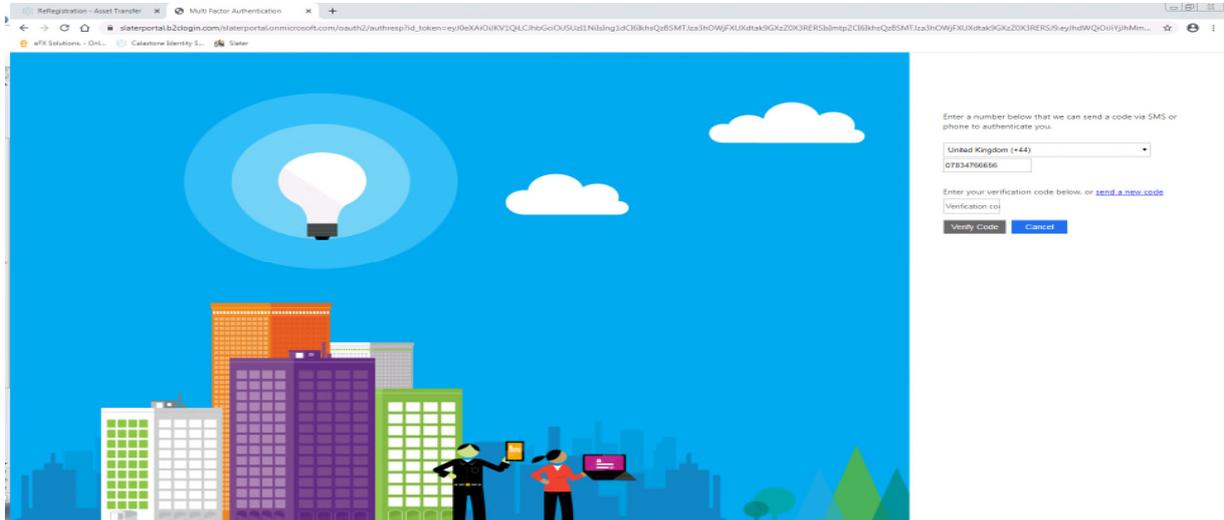
You then have two options to choose from, “Send Code” or Call Me”

Please note the “Send Code” option can be used for mobile numbers only, the “Call Me” option will work for mobile or landline.

Please note the two options have slightly different steps to follow which are detailed separately below.

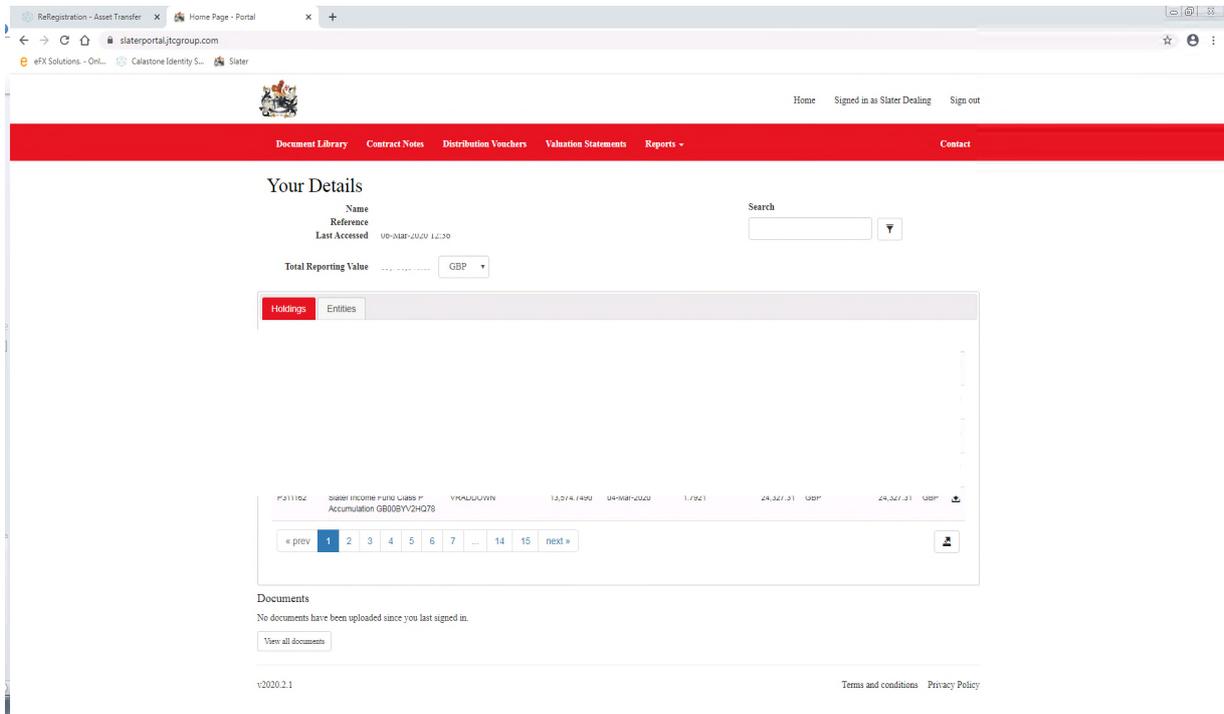
## “Send Code” Option

If you select this option you will receive a 6 digit code via Text Message and you will then be taken to the next screen below where you need to input the code received.



Please now input the verification code received via text/ in the box that is under “Enter your verification code below or send a new code”

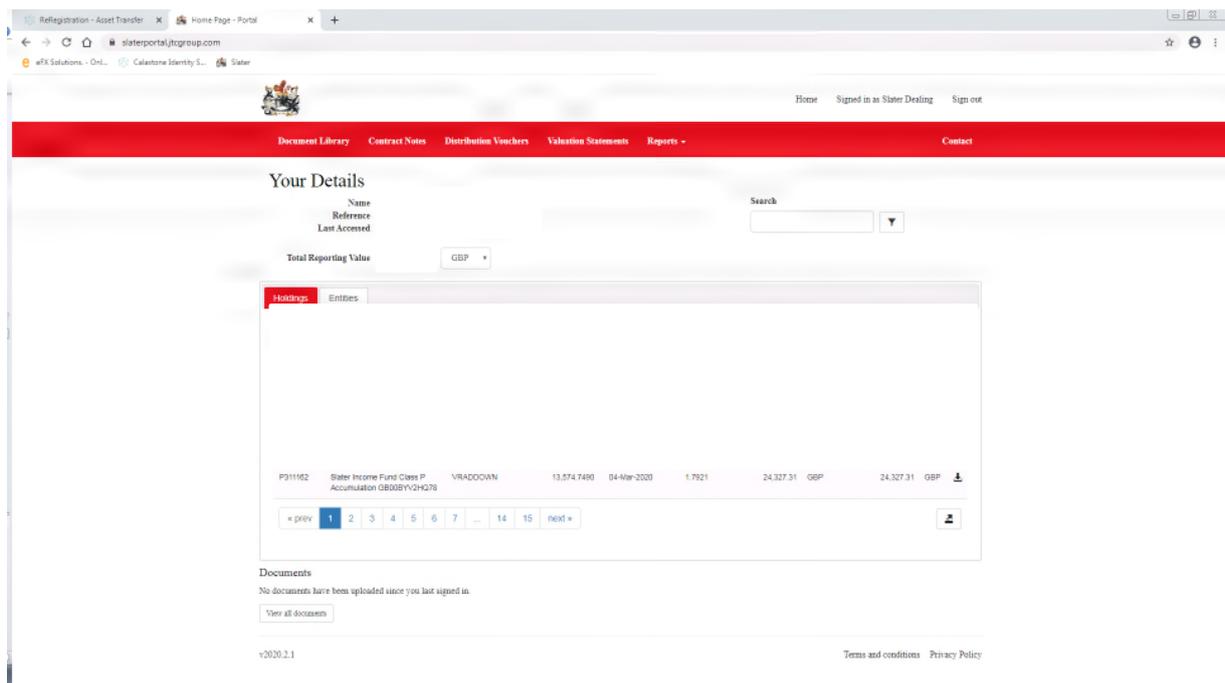
Please now select the “Verify Code” button and you will now be taken to a new screen where you will have to input a password of your choice, then once that is completed you will be taken to main investor portal landing page which should look like the below;



## **“Call Me” Option**

If you select this option you will receive a phone call and at the end of the call it will request you push the Pound key to verify the process, if you are using a UK phone they don't actually have a Pound key on them and instead you should use the Hash button (#) on your phone.

Once you have pushed the Hash button (#) the call should end and you will see your computer update to a screen where you have to input a password of your choice, once you have completed that you will taken to the below main investor portal landing page.



## **Investor Portal User Guidance**

The landing page will show all current holdings held by you and you can also view any contract notes, distribution vouchers & valuation statements using the corresponding buttons towards the top of the screen in the red banner.

Please note on each of these option screens you have the ability to search via date in order to narrow the number of documents on show.

This is done at the top of the screen where you will need to input a “From” and “To” date in the respective boxes and then select the box to the right of the “To” box which will say “Apply Filter” when you hover it

If you want to remove any filters added please use the red “X” button to the right of the “Apply Filter” button.

You also have the option to view historic prices by selecting the “Reports” button, here you can select the fund you wish to view prices for and the date range which you wish to query also.

## Troubleshooting

If asked for your Memorable word please be advised this will be the phone number you have linked to your account.

Please note that if you come across the below error page it is not an issue to worry about and does not mean there is anything wrong with your account.

If you click the “Home” button in the top right hand corner when see this screen it will return you to the main landing page of the portal where you can continue to view your account details.

