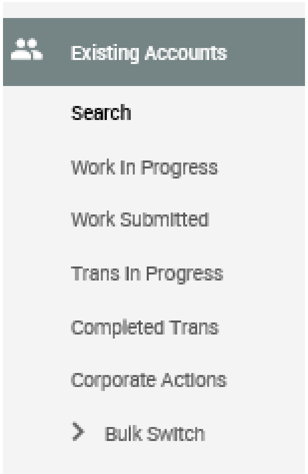
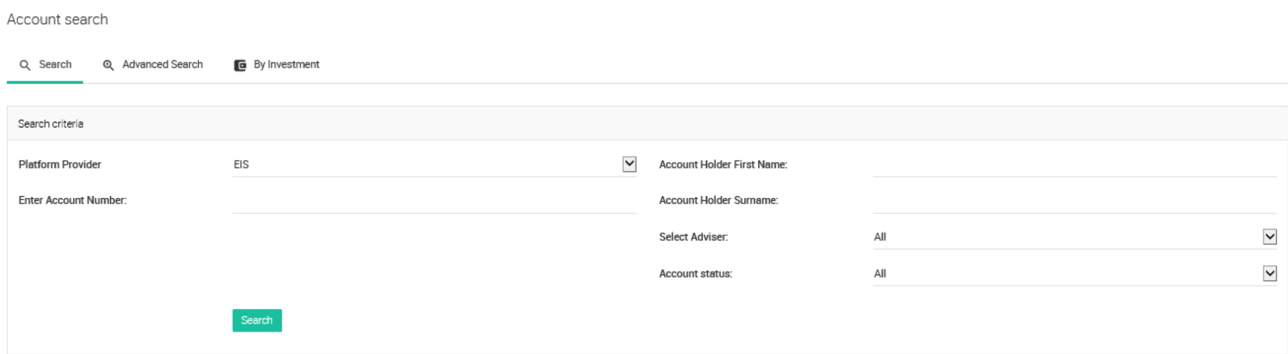
Step by step guide:
Adding and amending bank accounts

1. Log on using your credentials ensuring you are logged on as a user who has “Read/Write” permissions. If you do not have the correct permissions, please contact your Embark platform Super User.

2. You now need to search for the client, this is done on the left-hand menu under Existing Accounts and Search.



3. You can search for clients by either the Account number, first name or surname. Search results can also be filtered by financial adviser or Account status.



4. You can also use the Advanced Search facility which allows you to search on Account Details, Holder Details, Investments, Portfolio and Product Details with logical expressions. search on investments and portfolios.

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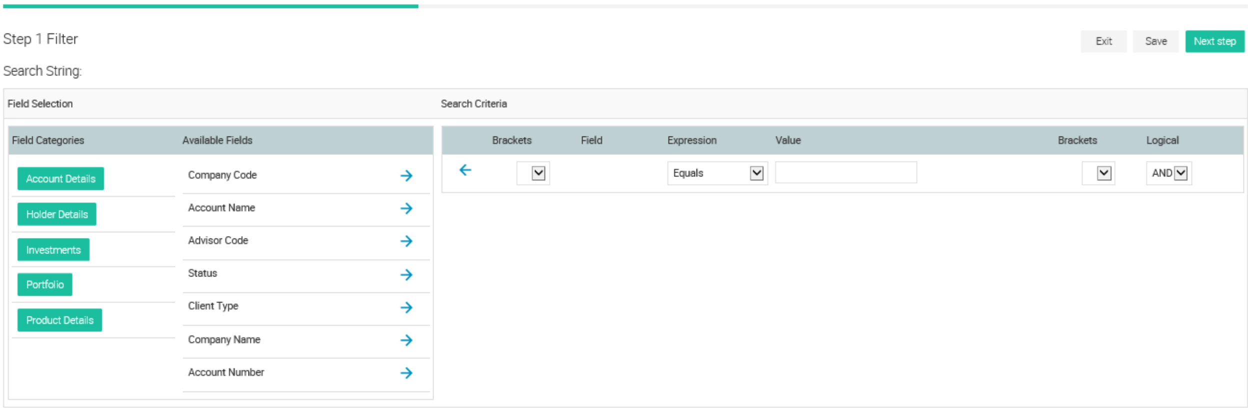
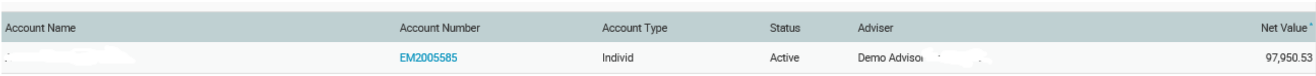
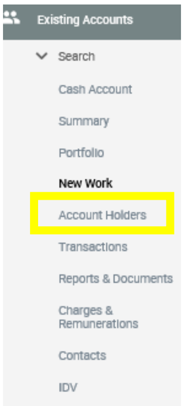


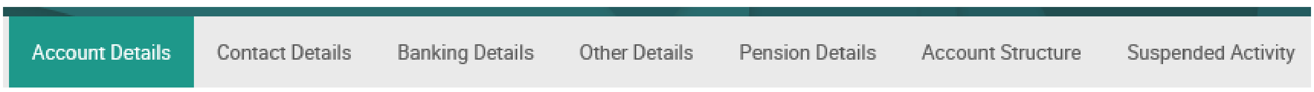
5. Once you have selected the search criteria, select "Search" to return a list of clients. Select the Account number in blue, this will return the client details



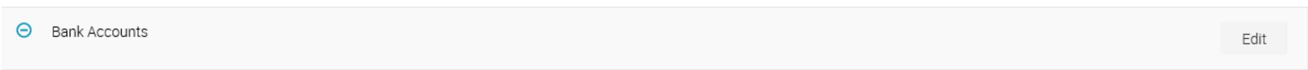
6. Now select "Account Holders" from the left-hand menu.



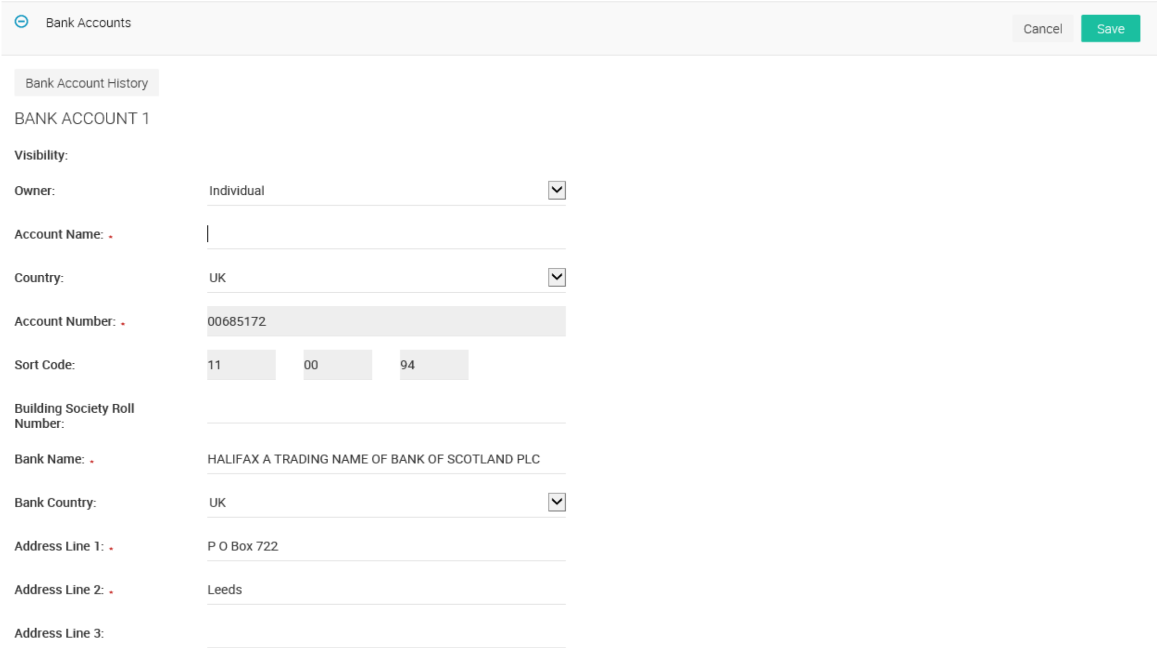
7. On the Account Holders screen, select "Banking Details" using the top navigation bar.



8. Select "Edit" to amend or add the bank details.



9. Amend details of an existing bank account. and then "Save".



10. To add a second bank account, scroll down to Bank Account 2 and add the details. Once done select "Save".

11. After saving, the platform will confirm the details have been successfully updated.