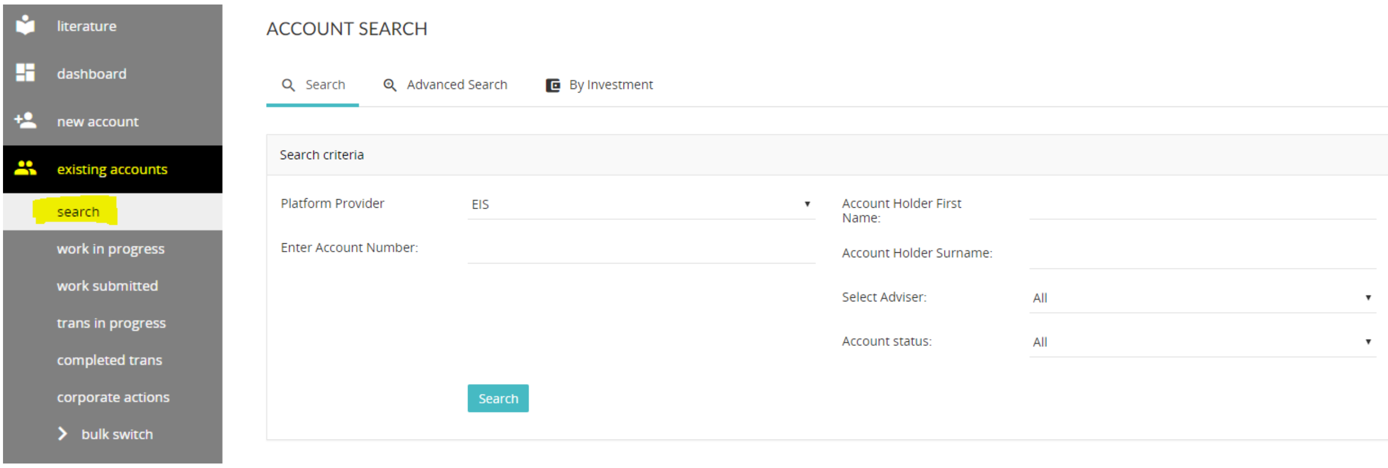
How to Guide:
Adding Beneficiaries

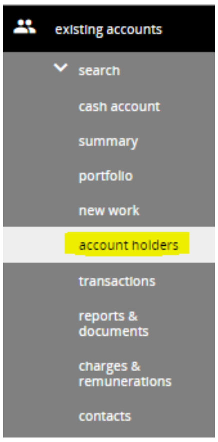
1. Log on using your credentials ensuring you are logged on as a user who has "Read/Write" permissions.

2. You now need to search for the client, this is done on the left-hand menu under "Existing Accounts" and "Search". Please note that the client must hold a pension product.

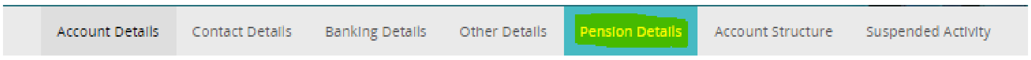
3. You can search for clients by the account number, name of individual adviser, or customer name, click on the "Search" button and a list of the clients within those search parameters will appear. If there is more than one matching the details provided, click on the relevant "Account Number", which are shown in blue.



4. Click on "Account Holders" on the left-hand menu after selecting a client from the search results.



5. Upon landing on the Account details screen, proceed by clicking on "Pension Details" screen using the navigation bar at the top of the page.



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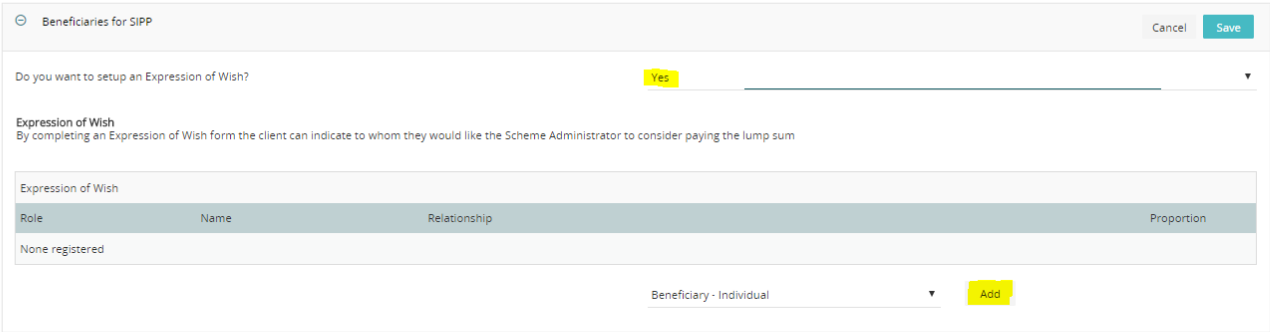
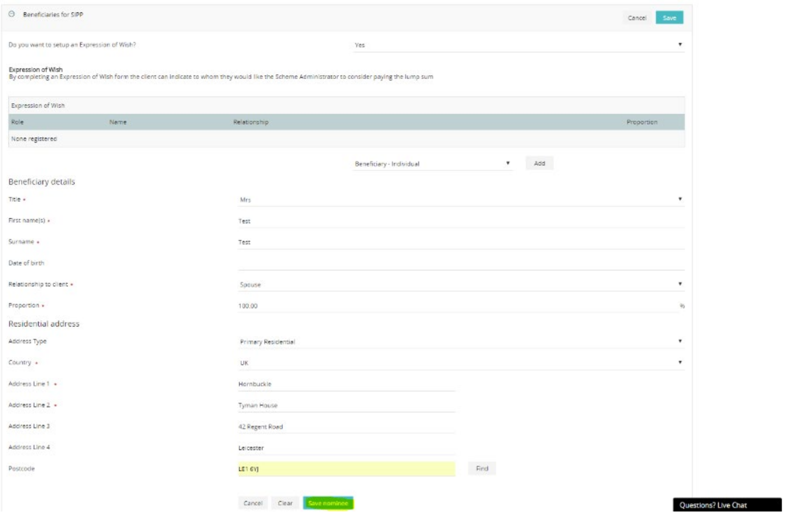
6. Upon landing on the "Pension Details" screen there will be a 'Beneficiaries for SIPP table. Select the Edit button and select Yes from the Expression of Wish drop-down list. The Expression of Wish table will be displayed.

7. Use the drop-down list to state whether the beneficiary is an individual or a company. Select 'Add' to enter details of the beneficiary including the proportion to be allocated followed You have the ability to add as many beneficiaries as the customer requires, but you must ensure that the total "Proportion" adds up to 100%.



8. You then need to select "Save Nominee" to save the beneficiary details.



9. Click on the "Save" button on the top right-hand corner of the Beneficiaries for SIPP table. Once you have done so the Platform will give you confirmation that the change has been successfully updated.