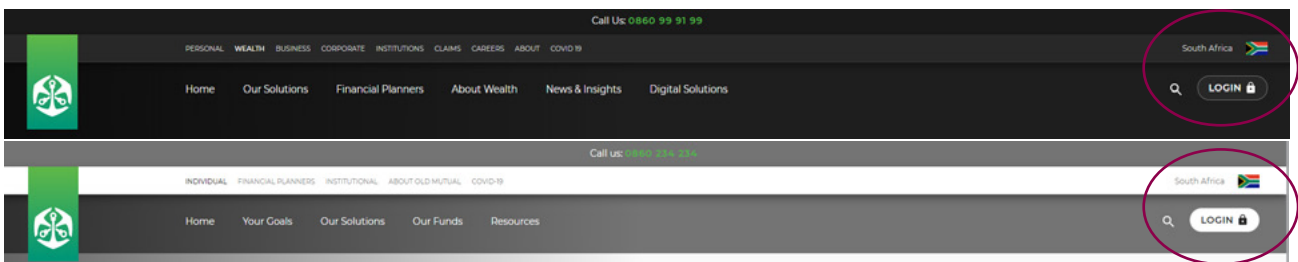


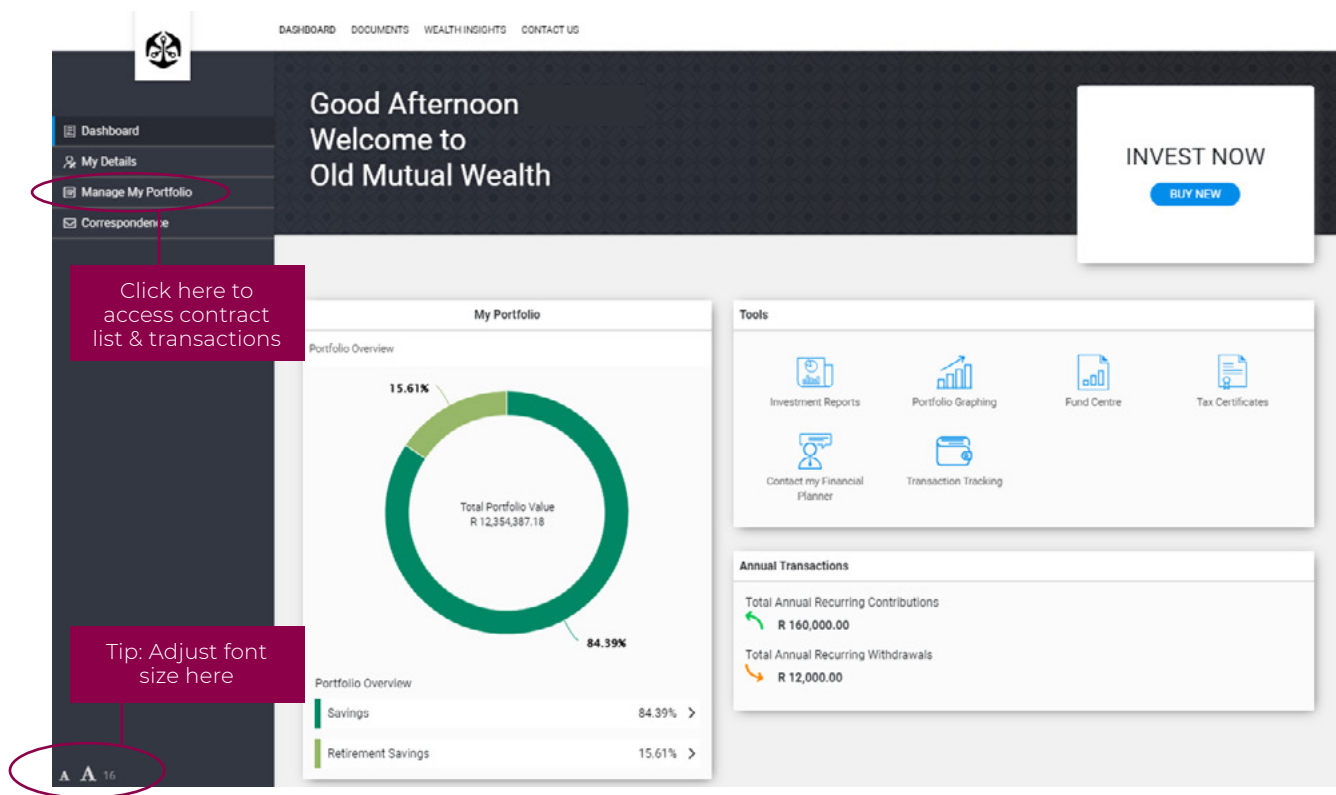


# OLD MUTUAL WEALTH CLIENT PORTAL BASIC USER GUIDE FOR CLIENT-INITIATED TRANSACTIONS

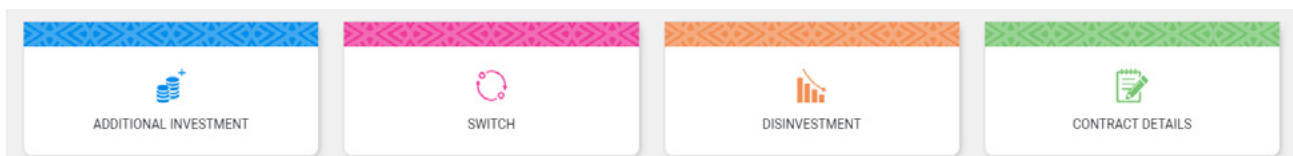
This guide has been designed to enable easy navigation when submitting transactions via straight-through-processing on the Old Mutual Wealth Client Portal. You can access the Old Mutual Wealth Client Portal by logging in into the portal from the Old Mutual Wealth public site ([www.omwealth.co.za](http://www.omwealth.co.za)).



Following logging in to the Old Mutual Wealth client portal, you will land on our home page, referred to as the **Dashboard**. This Dashboard provides you with a holistic portfolio overview, as well as access to a host of tools to enable easy self-service.



The following transactions are available to you on our Client Portal:

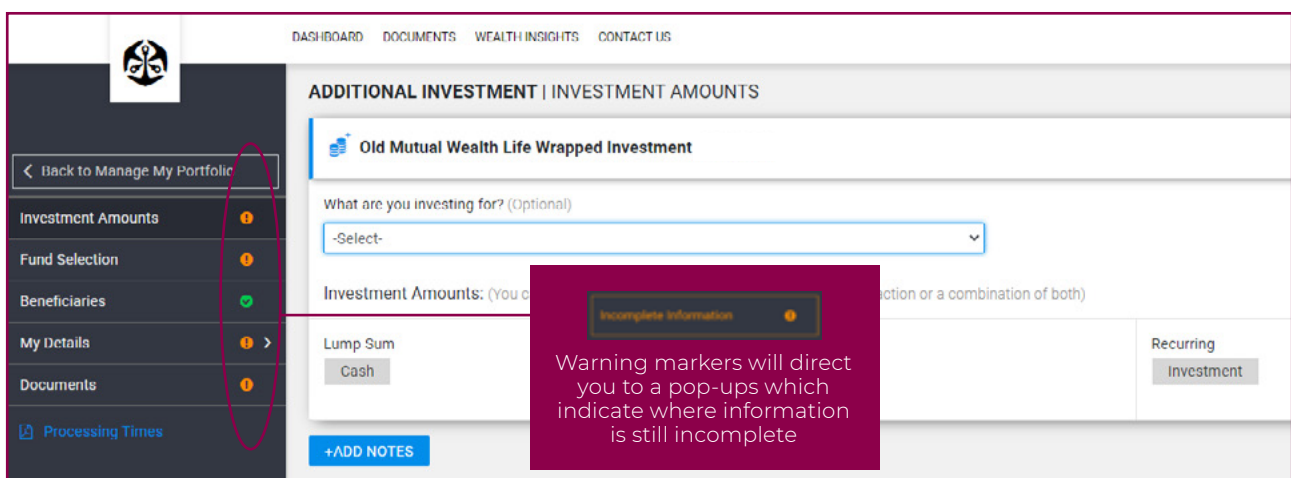


To select the self-service transactions on the Dashboard, click on the **“Manage My Portfolio”** tab in the left panel, and select your contract on which the transaction is required.



## ADDITIONAL INVESTMENT

On selecting the contract, click on the **Additional Investment** button, and the **Investment Amounts** screen will populate as per example below:



## STEPS TO COMPLETE YOUR ADDITIONAL INVESTMENT

- Select reason for investment from the drop-down menu (optional) and then select your additional investment amount(s) as either a **Lump Sum, Recurring Investment**, or **both**. Then click on **Continue**.
- Select the funds into which the additional amount is to be invested. The **Fund Allocation table** will be pre-populated with the existing funds that you are invested in for this contract. You may continue with your existing fund selection, or extend your fund selection for your contract from the **Strategy Funds** or **Target Funds** available in the **‘Fund Selection and Allocation’** section. You need to ensure the asset allocation total is **100%** before you can proceed.
- Once all the necessary information has been captured, the **Detailed Portfolio Report** and **Summary Portfolio Report** will be generated for detailed information on the transaction you have just captured.
- It is important to ensure your **Personal Details** are always correct. This includes contact details, employment details, related parties (if applicable) and your tax details.
- The final step refers you to the documents, to be read and understood, as well confirming any supporting documentation that may be required to be uploaded, such as proof of payment if you have selected “cash”. You can upload your document/s in the form of either pdf, jpg, jpeg, tif, or tiff file type. Once all the necessary steps are complete, you may **download and review the Investment Declaration**. The **‘Submit Application’** button will become available for you to complete your transaction.

**ADDITIONAL INVESTMENT | DOCUMENTS**

**INVESTMENT DECLARATION**

By ticking this box I am digitally signing the transaction instruction that contains specific investment vehicle and tax information, as well as the Dividends Tax declaration and undertaking and I confirm that it represents my signature.

- [Investment Declaration](#)
- [Our Fees Explained](#)
- [Lump Sum Fund Factsheet](#)
- [Lump Sum Summary Portfolio Builder Report](#)
- [Terms & Conditions](#)
- [Payment Details](#)

**REQUIRED DOCUMENTS**

**Client Documents** Delete Selection

Document Type	Actions
<input type="checkbox"/> Document Type	
<input type="checkbox"/> Proof of payment	<a href="#">View</a> <span style="float: right;">🗑️</span>

\*Upload pdf, jpg, jpeg, tif, or tiff file types.

Note: Please ensure that all documents are correct before clicking submit.

[SUBMIT APPLICATION](#)

## SWITCHES

Similar to the selection of additional investments, you may perform switches from the **'Manage My Portfolio'** tab in the left panel of the Dashboard, by selecting the contract on which you require the switch transaction to be actioned.

Once the correct contract has been selected and you have clicked the **Switch** button, the following switch type screen will populate. This provides the options for you to select either a **Single Switch** or a **Portfolio Switch** and **'Continue to Fund Selection'**:

**SWITCH | WHAT TYPE OF SWITCH WOULD YOU LIKE TO PERFORM?**

**Old Mutual Wealth Linked Investment**

What are you investing for? (Optional)

Switch Type

[Single Switch](#)

Choose specific funds to switch from within your portfolio

[Continue to Fund Selection →](#)

**Single Switch:** Choose specific funds to switch from within your portfolio


**Portfolio Switch:** Switch from all funds within your portfolio to rebalance your existing fund allocation

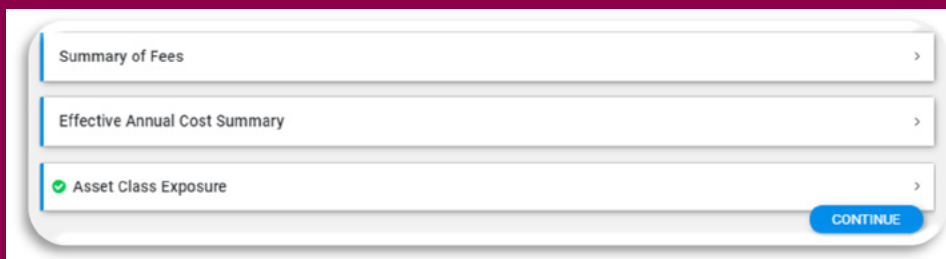
**IMPORTANT TO NOTE**

The switch instruction must be submitted before 3PM (SA time) on a business day to be processed the same day. A switch instruction submitted after 3PM will be processed on the next business day. Funds selected to switch into may become capped/closed before the switch instruction is processed and therefore may invalidate the switch instruction.

[hide this note ^](#)

[CONTINUE](#)

- If a Single Switch is selected, the existing funds table will populate with a Switch icon  to click and indicate the switch out portion, fund range (if applicable) and the new fund selection.
- If a Portfolio Switch is selected, the layout of the Switch Fund Allocation table is slightly different to the Single Switch, but the fund range (if applicable), allocation and new fund selection have the same functionality.
- **Distribution Options** must be indicated (where applicable) in both instances before you can '**Continue**'.



Please note that sub-sections in the Fund Selection, such as the Summary of Fees, are expandable/collapsible and may be clicked to view further information on the switch transaction being captured.

- Always ensure your **Personal Details** are correct. This includes contact details, employment details, related parties (if applicable) and tax details.
- The final step refers to the document which should be read and understood once all the necessary steps have been completed. **Download and review the Switch Declaration**. Click the '**Submit Application**' button to complete the transaction.

