

Secure Online Web Portal Registration HELP

How to self-register to use the Online Web Portal

To access our secure Online Web Portal and view your holdings online, complete the self-registration process as outlined below:

1. Go to the Magellan website –<https://magellaninvestmentpartners.com/> and click the 'Investor Login' button in the top right hand corner.
2. Click 'Investor Login' under the Apex Group registry section.
3. Select 'Investor Registration'.
4. Complete self-registration for online web portal access.

You will need the following details handy to complete the self-registration process:

1. Your Investor Number (Portfolio Number, HIN or SRN) which you can locate on your statements or welcome letter.
2. The fund name you are invested in.
3. Your contact details including your email address and mobile number as registered on your holding.
4. *Part* of the registered name (for example, if the holding name is JOHN ALBERT SMITH, entering 'SMITH' would suffice).
5. Country as per your registered address on your holding.
6. Postcode of the registered holding (if in Australia).



Portfolio Numbers are 6 characters.

HINs will commence with "X" followed by up to 11 digits.

SRNs will commence with "I" followed by 11 digits.

You will need to self-register for each Magellan investment you hold that has a different Account Name/Portfolio Number.

- View your unit holdings.
- View your transactions online
- Run customized reporting for different date ranges
- Access your AMMA (tax) Statements, Periodic Statements, and Distribution Statements
- Update your contact details* and correspondence elections
- Update your distribution preferences

For more assistance

If you require assistance, please call Apex Group on business days between 8:30am and 5:30pm (Sydney Time) on 1300 127 780 (in Australia), +61 2 8259 8566 (International) or 0800 787 621 (New Zealand)

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