

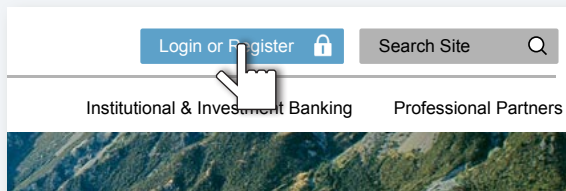
# Your guide to the Forsyth Barr website



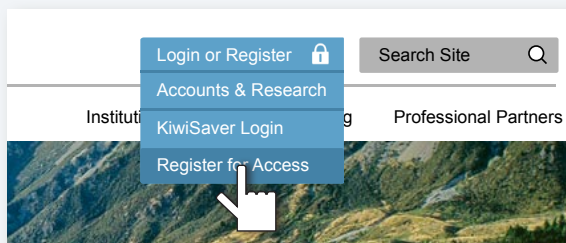
Clients can monitor their investment account(s) online, alongside pricing and news for New Zealand and Australian equity securities, market indices, currencies and commodities.

## To set up your account on the Forsyth Barr website:

1. Click on the **Login or Register** button on the right corner of the homepage.



2. To set up an account, press **Register for Access** from the three options available.



3. Fill in the required details in the Website User Registration screen.

### Website User Registration

**Your Name**

Please enter your first and last name

**Your email address\***

**Password\***

Minimum password length 8 characters.

**Confirm your password\***

Reenter your password

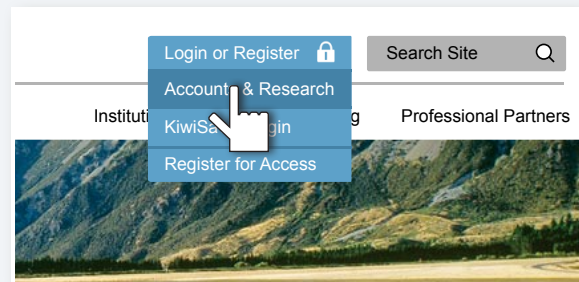
**I agree to the terms and conditions\***

☐

Please read and confirm that you agree to the [terms and conditions](#).

4. If you are already a client of Forsyth Barr, enter your account details at the bottom of the registration screen (you will find these details at the top right hand side of communications that we send you).
5. Press **Register** when you are finished.
6. A message will be sent to the email address you provided in step 3. Clicking on the link in that email will complete the registration process.

7. Once registered, you can login each time by clicking on the **Login or Register** button and choosing the **Accounts & Research** option.



8. Fill in your username (the email address you use to communicate with Forsyth Barr) and your password, then click **Login to the website**.

### Client login

Access your accounts and our research library

**Username/Email address**

**Password**

**Login to the website** ☐ Remember me on this computer

Do you need to [reset your password](#)?

If you have forgotten your username please [contact us](#)

**Tip:** When accessing your account from your own computer or mobile device you may find it useful to tick the **Remember me on this computer** checkbox (circled). We recommend you don't tick this if accessing your account on a public computer.

**Tip:** If you are having trouble logging in try resetting your password. To reset your password please see the instructions on page 5.

## Viewing your accounts

As a Forsyth Barr client online access enables you to view your account transactions and details on both desktop and mobile devices. **Tip** - throughout the website, words in blue font are links to another page or further information.

### To view your account transactions on the Forsyth Barr website:

1. Click on the **My Investment Accounts** link on the top right corner of the homepage. This brings up all your accounts.
2. To view transactions for an account, click the **Transactions** link on the right.
3. This brings up a summary showing the balance of your accounts (by currency). To view the transaction details of your **Cash Management** account or **Account Ledger**, choose the account from the summary list.
4. Selecting **Cash Management** displays all the New Zealand Dollar Asset transactions in your **Cash Management** account. If you wish to see previous transactions, use the pull-down list boxes to alter the date range (circled). To get back to where you were, click on the asset, i.e. **New Zealand Dollar Assets**.
5. To return to the **Investment Accounts** screen, click on the **Forsyth Barr logo** at the top of the screen.
6. To add other Forsyth Barr accounts, click the **Edit Accounts** button at the top of the **Investment Accounts** screen, then click **Add an Investment Account**.

1. Click on the **My Investment Accounts** link on the top right corner of the homepage. This brings up all your accounts.

2. To view transactions for an account, click the **Transactions** link on the right.

3. This brings up a summary showing the balance of your accounts (by currency). To view the transaction details of your **Cash Management** account or **Account Ledger**, choose the account from the summary list.

4. Selecting **Cash Management** displays all the New Zealand Dollar Asset transactions in your **Cash Management** account. If you wish to see previous transactions, use the pull-down list boxes to alter the date range (circled). To get back to where you were, click on the asset, i.e. **New Zealand Dollar Assets**.

5. To return to the **Investment Accounts** screen, click on the **Forsyth Barr logo** at the top of the screen.

6. To add other Forsyth Barr accounts, click the **Edit Accounts** button at the top of the **Investment Accounts** screen, then click **Add an Investment Account**.

## To view your Portfolio on the Forsyth Barr website:

1. If you are a **Portfolio Advisory Service** or **Private Portfolio Management** client, click on the **My Investment Accounts** link at the top of the homepage.

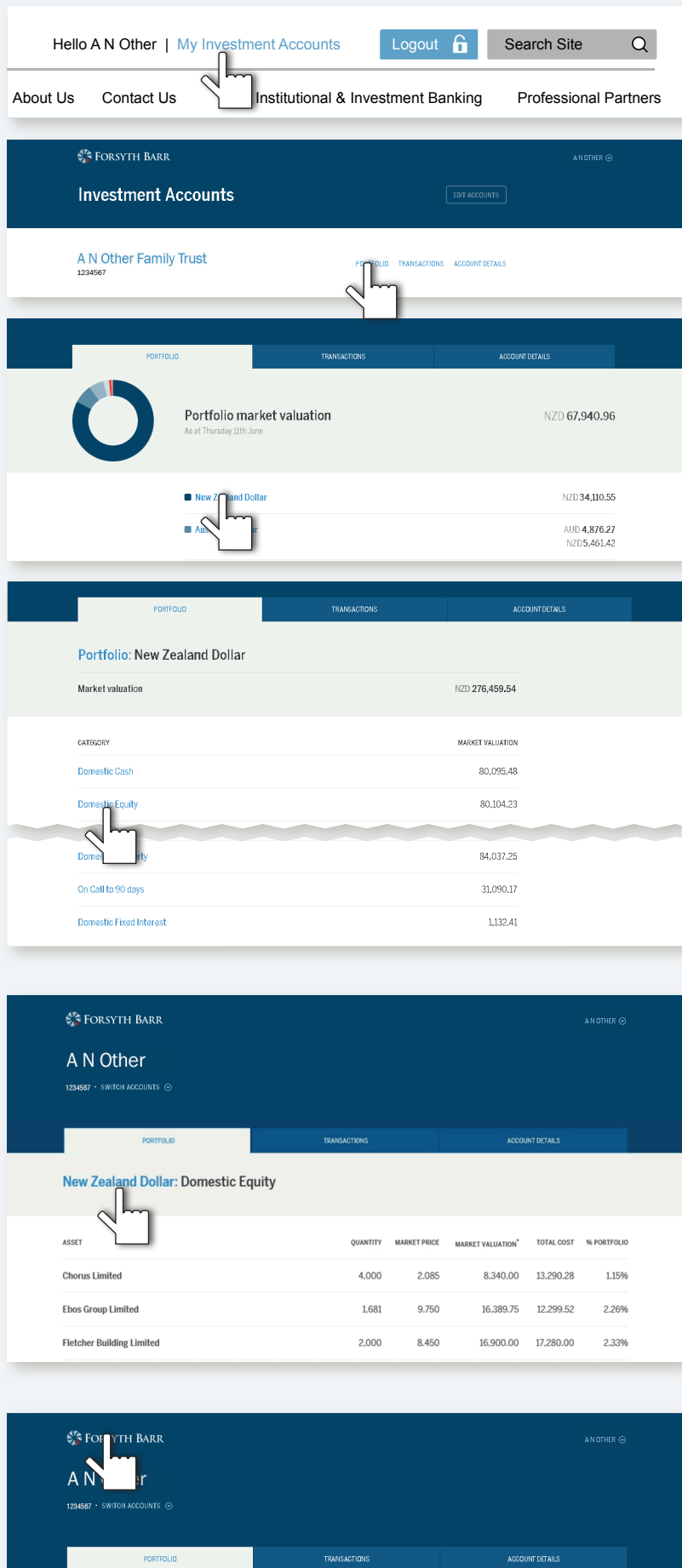
2. This displays your accounts you have registered with us. To view the current portfolio of an account, click on the **Portfolio** link.

3. This shows a summary (by currency) of what is held in your Portfolio. To view what is held in each currency, click on the relevant currency link, such as **New Zealand Dollar**

4. This displays your portfolio in more detail (by asset class). To view your portfolio by detailed security, click on the asset class you wish to view, i.e. **Domestic Equity**.

5. To return to the New Zealand Dollar Summary screen, click on the asset class, **New Zealand Dollar**. You can also return to the Portfolio Summary screen, by clicking on the **Portfolio** tab.

6. To return to the **My Investment Accounts** screen, click on the **Forsyth Barr** logo at the top of the screen.



Hello A N Other | [My Investment Accounts](#) [Logout](#) [Search Site](#)

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**Investment Accounts** [EDIT ACCOUNTS](#)

**A N Other Family Trust** 1234567 [PORTFOLIO](#) [TRANSACTIONS](#) [ACCOUNT DETAILS](#)

**Portfolio market valuation** NZD 67,940.96  
As at Thursday 11th June

[New Zealand Dollar](#) NZD 34,110.55  
[Australian Dollar](#) AUD 4,876.27  
NZD 5,461.42

**Portfolio: New Zealand Dollar**

Market valuation NZD 276,459.54

CATEGORY	MARKET VALUATION
<a href="#">Domestic Cash</a>	80,095.48
<a href="#">Domestic Equity</a>	80,104.23
<a href="#">Domestic Fixed Interest</a>	84,037.25
<a href="#">On Call to 90 days</a>	31,090.17
<a href="#">Domestic Fixed Interest</a>	1,132.41

**New Zealand Dollar: Domestic Equity**

ASSET	QUANTITY	MARKET PRICE	MARKET VALUATION*	TOTAL COST	% PORTFOLIO
Chorus Limited	4,000	2.085	8,340.00	13,290.28	1.15%
Ecos Group Limited	1,681	9.750	16,389.75	12,299.52	2.26%
Fletcher Building Limited	2,000	8.450	16,900.00	17,280.00	2.33%

**A N Other** 1234567 [SWITCH ACCOUNTS](#)

[PORTFOLIO](#) [TRANSACTIONS](#) [ACCOUNT DETAILS](#)

## To view/change your account details on the Forsyth Barr website:

1. To view and/or change account details for a specific account, click on the **Account Details** link.

2. Items that can be altered are withholding tax rates, PIR rates, IRD numbers, and primary account holder email and phone number details.

For security reasons, a postal address or name change cannot be carried out online. If you need to notify us of a change of name or address, please download an account update form from the link provided (circled) and send it back to us.

Once your information has been entered into the relevant fields, click the **Save Changes** button to confirm.

**Note:** If you are an authorised person you can view **Account Detail** information, but are unable to make any changes.

3. To return to the **My Investment Accounts** screen, click on the **Forsyth Barr logo** link at the top of the screen.

4. To return to the homepage, click on the **Forsyth Barr logo** at the bottom of the screen.

**Investment Accounts** [EDIT ACCOUNTS](#)

**A N Other Family Trust** 1234567 [PORTFOLIO](#) [TRANSACTIONS](#) [ACCOUNT DETAILS](#)

Edit your: [Account details](#) [Primary contact](#) [Account holders](#)

**Account details** [BACK TO TOP](#)

Account Investment Advisor(s): [Andrew D Visor](#)

Account type: Private Portfolio Management

Withhold code: NZ Resident 33%

Prescribed investor rate (PIR): 28%

IRD number: 111-222-333  
e.g. 12-345-678 or 123-456-789

**Primary contact** [BACK TO TOP](#)

Name and address changes require proof of identity - please download the full account update form (PDF) to change any of these details.

Salutation: A N Other

Postal address: 1 Interesting Lane, Te Nable, North Shore City, 0236

Residential address: same as above

Email address: an\_other@internetprov.co.nz

Business phone: 01 234 5678

Private phone: 09 876 5432

Mobile phone: 020 123 4567

**Account holders** [BACK TO TOP](#)

**Anthony A N Other**

IRD number: 111-222-333  
e.g. 12-345-678 or 123-456-789

Prescribed investor rate (PIR): 28%

**SAVE CHANGES**

**i** You do not have permission to make changes to this account.

**FORSYTH BARR** [AN OTHER](#)

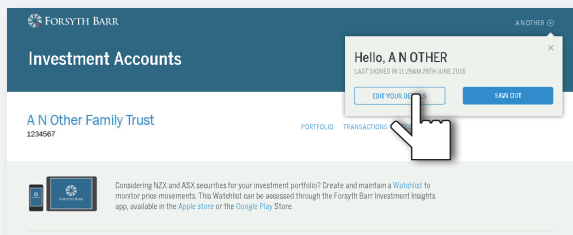
**A N Other** 1234567 [SWITCH ACCOUNTS](#)

[PORTFOLIO](#) [TRANSACTIONS](#) [ACCOUNT DETAILS](#)

**FORSYTH BARR** [MARKETS & RESEARCH](#) [YOUR ADVISOR: Andrew D Visor](#)

## Changing your password

1. To change your password or edit your city, salutation and/or name, click on your salutation at the top, right hand side of the **Investment Account** home page, then click **Edit Your Details** to bring up these options.



2. To change your password click on the **Change Your Password** tab and complete the required fields.

### PLEASE NOTE:

We will never ask you for your password.

## Editing your greeting

3. The **Edit Your Details** tab allows you to edit your city, salutation and name. To change your email address, please see the instructions on page 4.

**Tip:** The Salutation entered is what you will be greeted with throughout the site, e.g. as above 'Hello A N Other'

## Resetting your password

1. If you have forgotten your current password, and need to create a new one, click on the **reset your password** link at the bottom right hand side of the Client login screen.

2. This brings up the **Password Reset** screen. Type in your email address in the **email address** box and press the **Reset Password** button.

3. An email from [website@forsythbarr.co.nz](mailto:website@forsythbarr.co.nz) with instructions on how to reset your password will be sent to the email address you provided.
4. Clicking on the link contained in the email brings up a screen that allows you to choose a new password. Press **Set new Password** to confirm your new password.

5. If you have forgotten your user name, you will need to contact us on 0800 367 227.

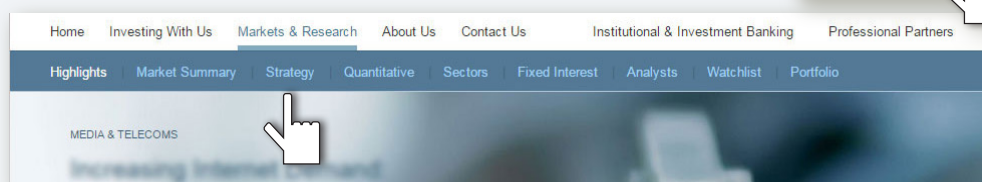
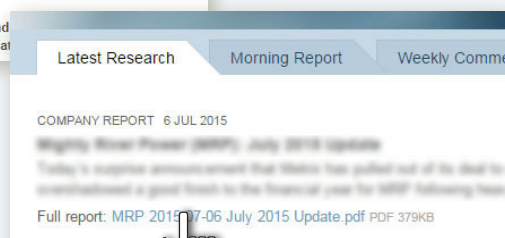
## Markets & Research - Highlights page

This section is set up to provide you with an overview of Forsyth Barr's research. This includes the Morning Report, equity and fixed interest weekly reports as well as the latest research reports applicable to your Watchlist. In addition, a featured piece of research is included in this section at the top of the page.



Within the 'Latest Research' tab the latest research reports applicable to the stocks in your Watchlist will be displayed. Click on a research report to view.

Navigate through the other areas of the Markets & Research section by clicking on the tabs along the top of the screen. The analysts associated with each area can also be viewed within these sections.



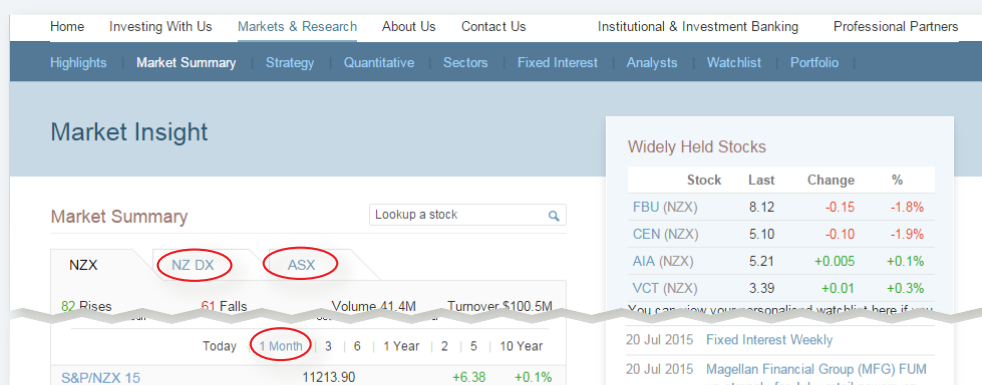
## Market Summary

A summary of market data is included, covering NZX50 and ASX200, top rises and falls, recent company news, global indices, commodities and currencies.

1. Click on the **Market Summary** tab along the top of the web page



2. This brings up the **Market Summary** screen. From here you have many different options to view. For example, to view the NZX50 over the last month, click on '1 Month' link (circled); to view other portfolio graphs, click on their names (circled).





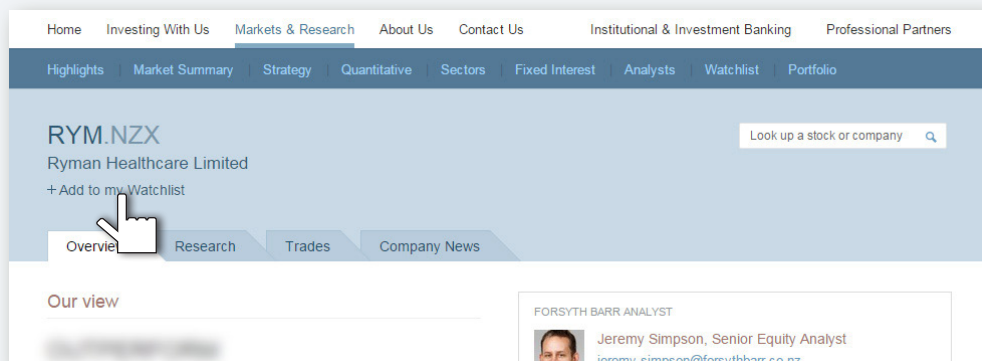
## Watchlist

Here you can create and maintain a Watchlist of securities you are considering for your investment portfolio. The benefit of creating a Watchlist is that it will enable us to deliver research applicable to these securities on your landing page.

In addition, you can keep in touch with securities on the go by downloading the Forsyth Barr Investment Insights App (available for iPhone and iPad from the Apple App store or for Android devices from the Google Play Store). Once logged-in to your account, your Watchlist will sync with the App so you can maintain your Watchlist across web and mobile devices.

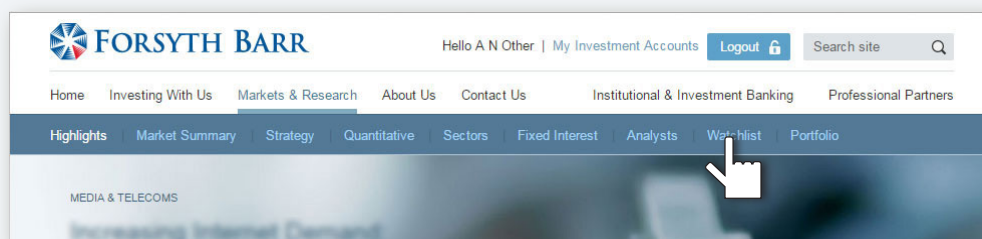
### How to set up a Watchlist:

Use the **Search** functions as discussed on page 7. Once you have reached the page of the stock you wish to add to your Watchlist, click on the **Add to my Watchlist** button.



### How to view your Watchlist:

From within the **Markets & Research** section of the website, click on the **Watchlist** link.



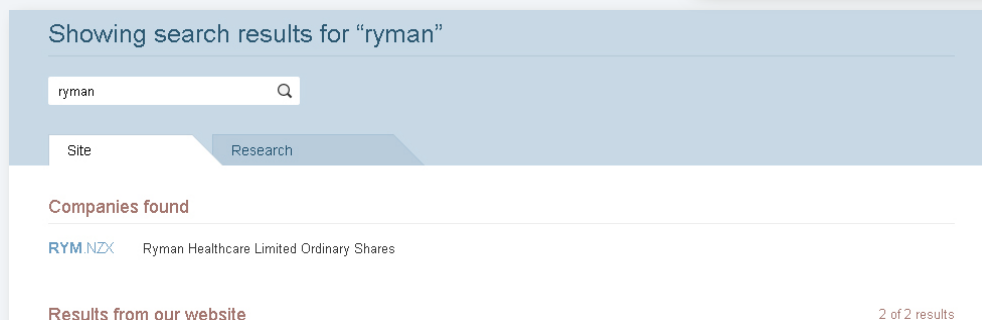
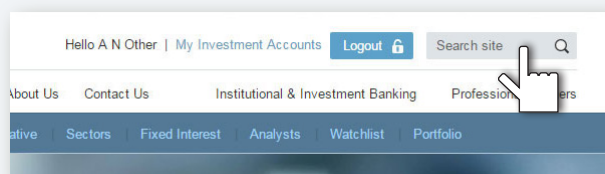
## Search function

Search may be performed from anywhere within the Forsyth Barr website. Use the site-search box, always located on the top right of every screen, alternatively, use the 'stock-search' located on the Highlights or company pages.

### Site Search

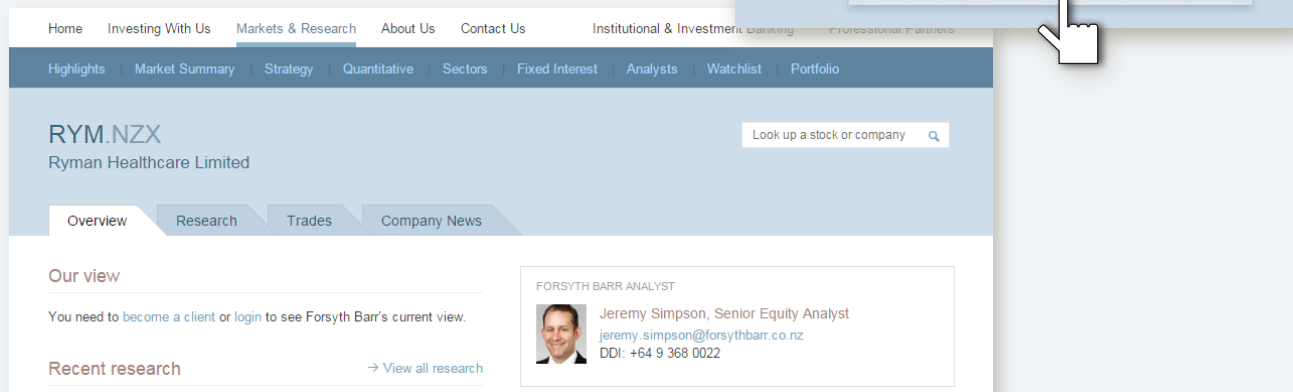
Using the site-search box, type in the name of the company in the search box (pictured right) and press **Enter**.

The search results will include links to the company page associated with your search result, as well as the Forsyth Barr analyst. In addition, a separate tab, 'Research' shows the research reports relating to your search.



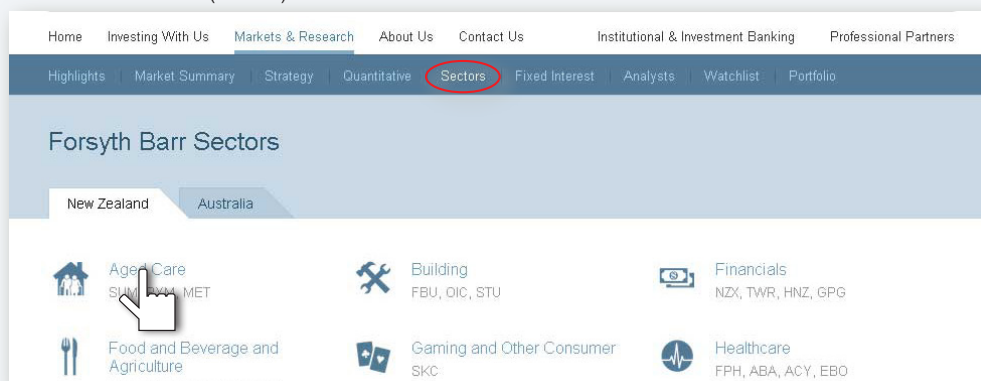
## Stock Search

Using the stock search box on the Highlights page or from within a Company page, start typing the name of the desired stock. As you type, several different stocks will appear. Click or arrow to the applicable stock to be taken straight to that stock's page.



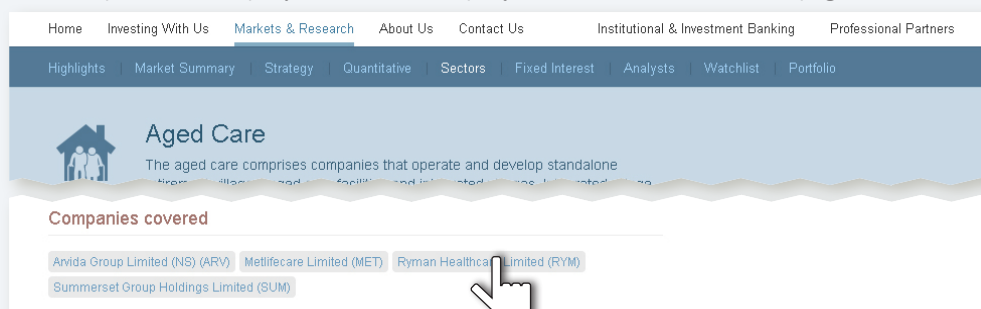
## Research Sectors

3. Forsyth Barr has one of New Zealand's leading research teams and regularly publishes reports on over 60 NZX listed companies. Through our affiliation with Ord Minnett in Australia, clients also have access to research and recommendations on over 300 ASX listed companies. You can view the latest research on each sector, as well as the corresponding analyst via the **Sectors** tab (circled).



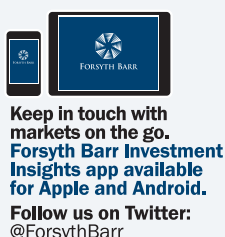
## Company View

To view a particular company, click on the company's name from within a sector page...



...or use the search function as explained on page 7.

**For a range of short and informative 'How-to' video guides visit [www.forsythbarr.co.nz/howtovideos](http://www.forsythbarr.co.nz/howtovideos)**  
**For further information on the Investment Insights app visit [www.forsythbarr.co.nz/app](http://www.forsythbarr.co.nz/app)**



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