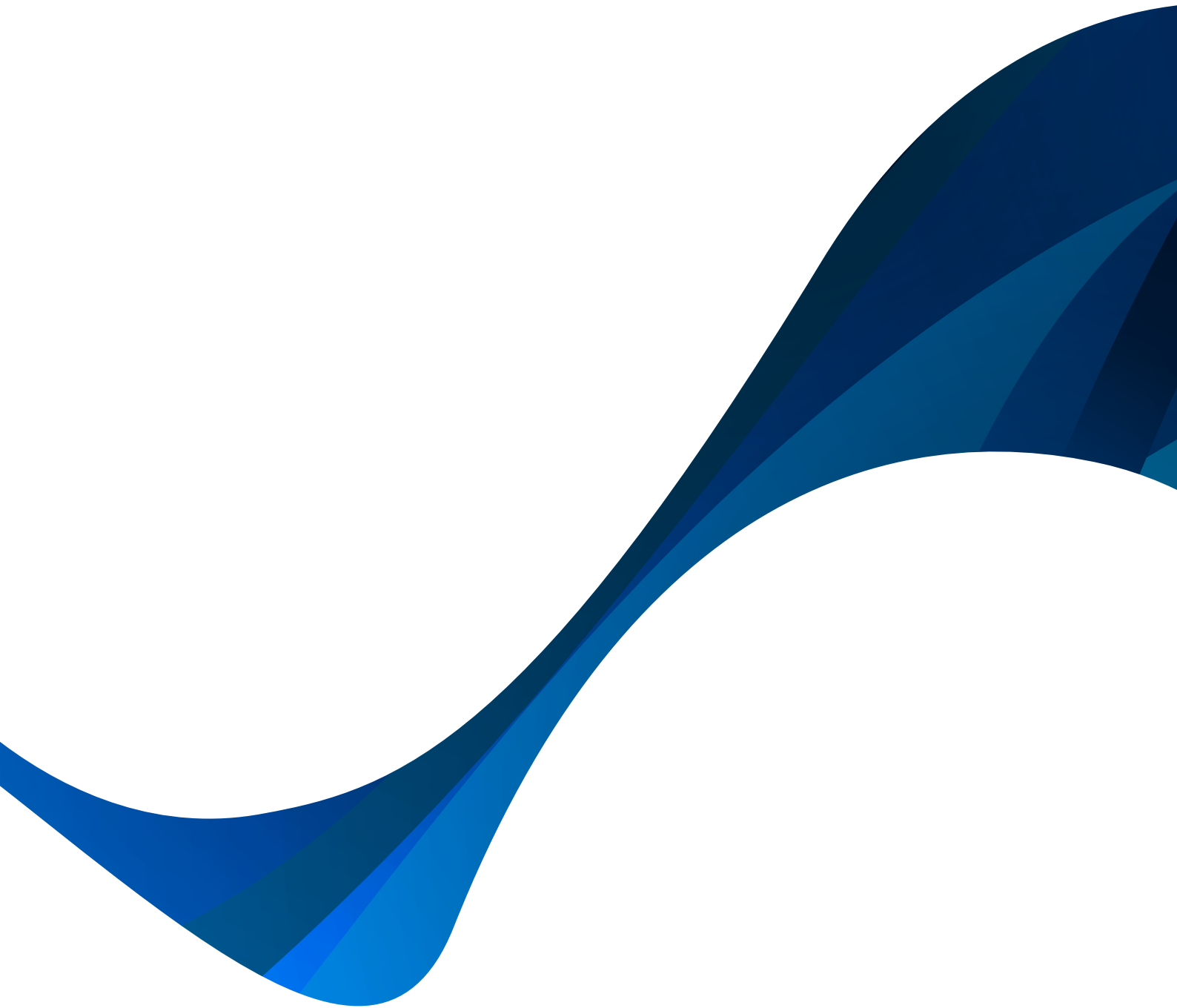
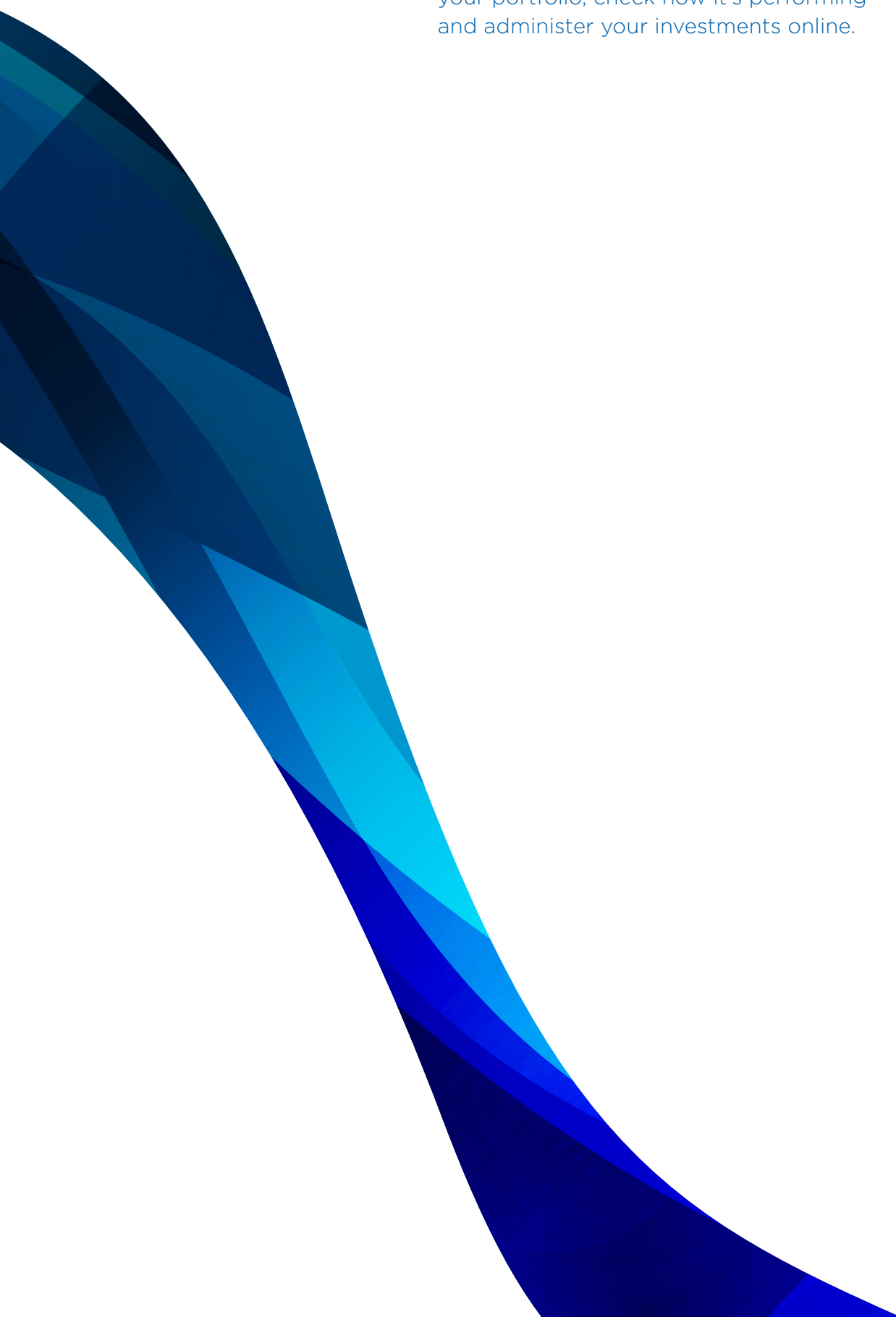


James Hay Online

Member Registration Guide





Please follow the step-by-step process
to register on James Hay Online.

Once registered, you will be able to view
your portfolio, check how it's performing
and administer your investments online.

Member Registration Guide

Step-by-Step

1. Go to <https://www.jameshay.co.uk/Portal/login.aspx>
2. Under Online Registration, click the 'Client Button'.
3. You are now into a straightforward, three step registration process.

Step One

The screenshot shows the 'Client Registration' page for James Hay Online. At the top, there is a navigation bar with the James Hay Partnership logo and 'James Hay Online'. Below the navigation bar, the page title is 'Client Registration'. A progress indicator shows three steps: 'Personal details' (1), 'Login details' (2), and 'Confirmation' (3). The 'Personal details' step is currently active. The form contains the following fields: 'Title' (a dropdown menu with the placeholder 'Please select your title'), 'Forename', 'Surname', 'Email Address', and 'Member Number (if applicable)'. A 'Next' button is located at the bottom right of the form. Below the form, there is a 'Next' button.

4. Enter your Title using the drop down menu.
5. Enter your Forename, Surname, Email Address and Member Number.
6. Click 'Next'.

Step Two

The screenshot shows the 'Client Registration' page for James Hay Online, now on the 'Login details' step. The progress indicator shows 'Personal details' (1), 'Login details' (2), and 'Confirmation' (3). The 'Login details' step is currently active. The form contains the following fields: 'Username' (with a 'Check' button), 'Password', 'Passcode', 'Mother's Maiden Name', 'Memorable Date', 'Memorable Place', 'Place of Birth', and 'School'. A 'Previous' button is located at the bottom left of the form, and a 'Next' button is located at the bottom right of the form.

Member Registration Guide cont.

7. Enter your desired username for James Hay Online and click '**Check**'. Clicking '**Check**' ensures the username selected is not currently in use. You will receive either a tick or a cross next to the check button. Once you have a tick, the username is available and you can proceed.
8. Enter a Password and Passcode. These are the security details that you will use to log into the James Hay Online service going forward.
9. Complete the memorable information fields (Mother's Maiden Name, School etc).
10. Click 'Next'.

Step Three

JAMES HAY PARTNERSHIP James Hay Online

Client Registration

Personal details Login details Confirmation

Please open the James Hay Online Terms & Conditions by clicking [here](#). You must open and accept the Terms & Conditions to be able to Submit your registration.

I have read and agree to the James Hay Online Terms & Conditions.

Previous Submit your registration

11. Click the Terms & Conditions link and read the Terms & Conditions for using James Hay Online.
12. Click Agree (if in agreement to the terms).
13. Click 'Submit your registration' button.

JAMES HAY PARTNERSHIP James Hay Online

Client Registration

Thank you for registering for James Hay Online - the first step to using the excellent range of tools, information and functionality available.

You have been sent an email to the address nominated (jon.warren@ameshay.co.uk) in the registration process. You will need to open the email and click on the link provided to validate the email address entered before you can log into James Hay Online.

If you do not receive your validation email within 15 minutes of completing the online registration, please take the following steps:

- Login to James Hay Online with the credentials supplied at the point of registration. You will be prompted to request another validation email to be resent to the address you have supplied.
- Check your spam and deleted items folders to ensure your email service has not incorrectly auto-classified the email. The email will be from do-not-reply@ameshay.co.uk.

If you continue to experience issues, please contact us.

Submit your registration

14. Your registration is complete. You will be sent a validation email to the address stated in point 5.

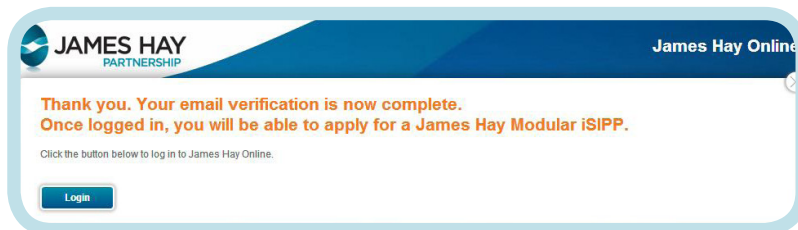
Member Registration Guide cont.

15. Open the email and click the 'Click here to validate your email address' link.



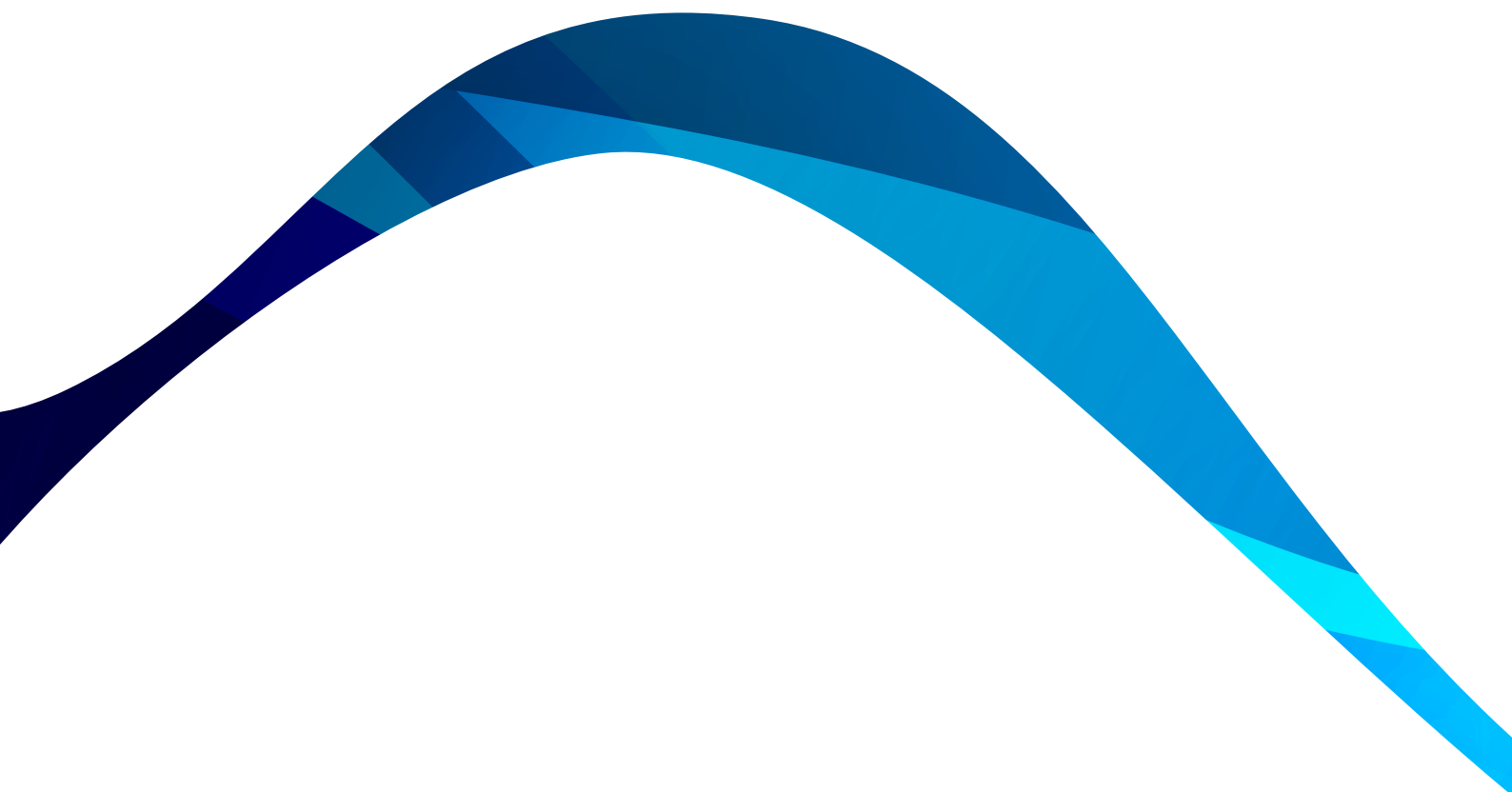
16. An Internet window will open and confirm the account has been verified.

17. Click the 'Login' button.



18. You can now login to James Hay Online using the details you entered in Points 8 & 9.
19. James Hay Partnership take the protection of client data very seriously, so although you can now login, your information will not be displayed yet. Before you can log in and access your details, you will have to wait for a Registration Code to be sent to your home address, which the system automatically generates when you register.
20. Upon receipt of the Registration Code, login to James Hay Online and enter the code into the Registration Code field on the home page.

Your registration is now complete.



James Hay Partnership is able to provide literature in alternative formats. The formats available are: Large Print (as recommended by RNIB), Braille, Audio Tape and PC Disk. If you would like to receive this document in an alternative format please contact us on 03455 212 414. For the hard of hearing and / or speech impaired, please use the Tynetalk service via 18001 03455 212 414.

James Hay Partnership is the trading name of James Hay Insurance Company Limited (JHIC) (registered in Jersey number 77318); IPS Pensions Limited (IPS) (registered in England number 2601833); James Hay Administration Company Limited (JHAC) (registered in England number 4068398); James Hay Pension Trustees Limited (JHPT) (registered in England number 1435887); James Hay Wrap Managers Limited (JHWM) (registered in England number 4773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England number 7259308); PAL Trustees Limited (PAL) (registered in England number 1666419); Santhouse Pensioner Trustee Company Limited (SPTCL) (registered in England number 1670940); Sarum Trustees Limited (SarumTL) (registered in England number 1003681); Sealgrove Trustees Limited (STL) (registered in England number 1444964); The IPS Partnership Plc (IPS Plc) (registered in England number 1458445); Union Pension Trustees Limited (UPT) (registered in England number 2634371) and Union Pensions Trustees (London) Limited (UPTL) (registered in England number 1739546). JHIC has its registered office at 3rd Floor, 37 Esplanade, St Helier, Jersey, JE2 3QA. IPS, JHAC, JHPT, JHWM, JHWNC, SPTCL, SarumTL and IPS Plc have their registered office at Trinity House, Buckingham Business Park, Anderson Road, Swavesey, Cambs CB24 4UQ. PAL, STL, UPT and UPTL have their registered office at Dunn's House, St Paul's Road, Salisbury, SP2 7BF. JHIC is regulated by the Jersey Financial Services Commission and JHAC, JHWM, IPS and IPS Plc are authorised and regulated by the Financial Conduct Authority. The provision of Small Self Administered Schemes (SSAS) and trustee and/or administration services for SSAS are not regulated by the FCA. Therefore, IPS and IPS Plc are not regulated by the FCA in relation to these schemes or services.(01/14)