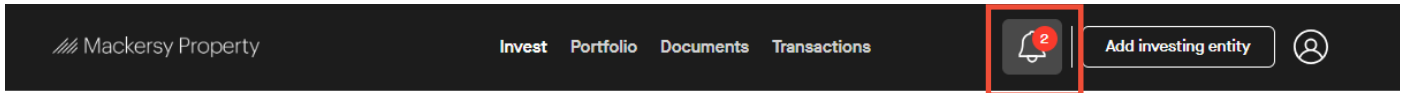


How do I create a new investing entity?

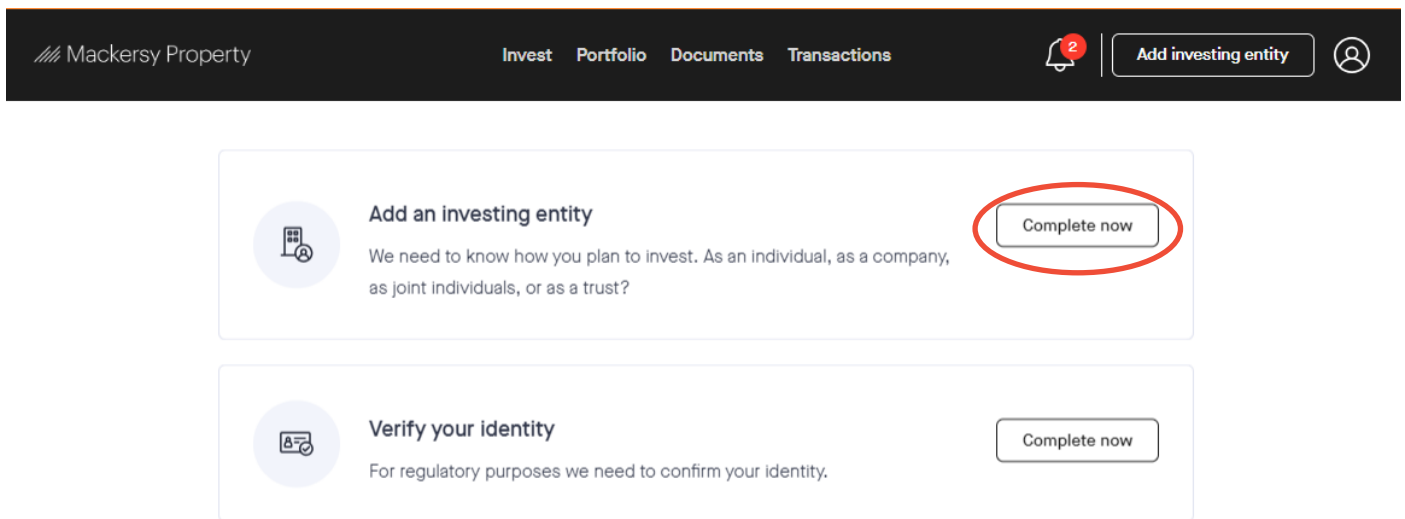
Create a new investing entity

After you've created your account, the next step is to create an investing entity which you will invest under.

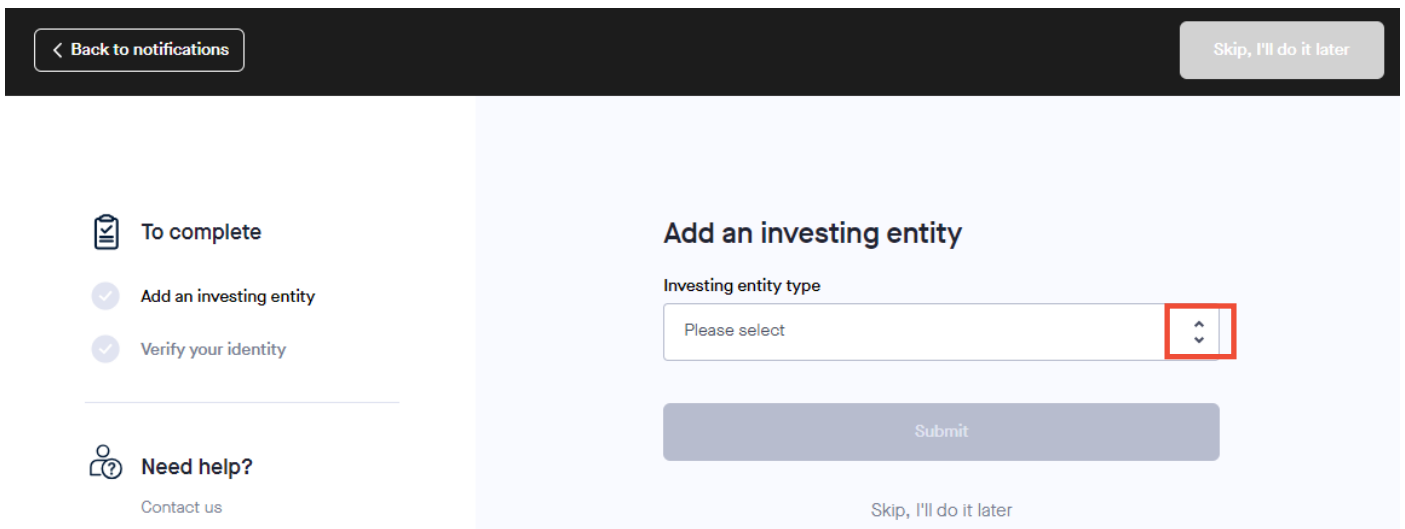
1. Log in to the Investor Portal.
2. Click the **notification bell** (in the header to the right side of the page) and choose the right task to complete.



3. Go to "Add an investing entity" by clicking on "Complete now" on the right-hand side.

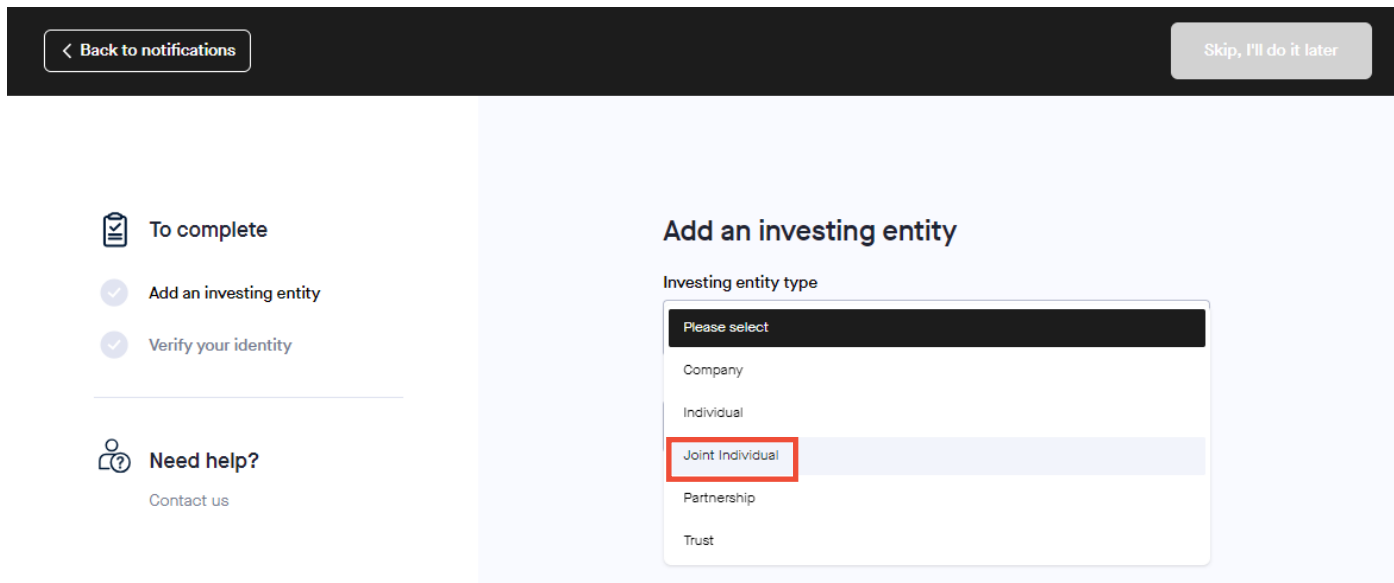


4. You will now have the option of choosing the type of investing entity you want to set up.
Your options are individual, joint individual, company and trust.



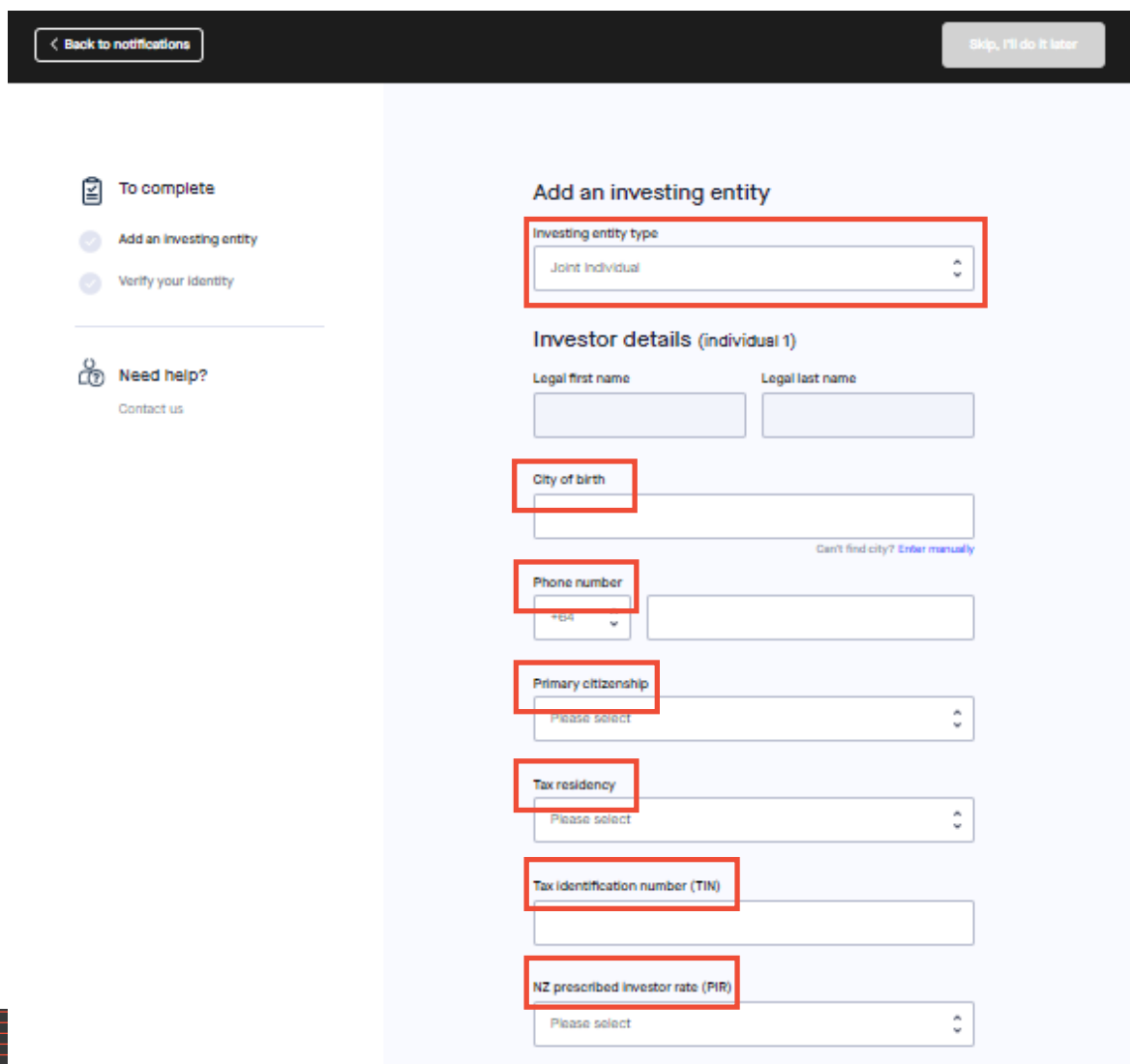
How do I create a new investing entity?

5. For this example, we will choose a "Joint Individual" entity type.



The screenshot shows the 'Add an investing entity' form. On the left, there is a sidebar with a 'To complete' section containing 'Add an investing entity' and 'Verify your identity', and a 'Need help?' section with a 'Contact us' link. The main form area has a title 'Add an investing entity' and a section 'Investing entity type' with a dropdown menu. The dropdown menu is open, showing options: 'Please select', 'Company', 'Individual', 'Joint Individual' (highlighted with a red box), 'Partnership', and 'Trust'. At the top of the form, there are two buttons: '< Back to notifications' and 'Skip, I'll do it later'.

6. Next, you will be asked to enter additional information, such as tax and investment information (the required fields boxed in red will vary based on your investing entity type).



The screenshot shows the 'Add an investing entity' form with the 'Investing entity type' dropdown set to 'Joint Individual'. Below this is the 'Investor details (individual 1)' section. Several fields are highlighted with red boxes: 'Investing entity type', 'City of birth', 'Phone number', 'Primary citizenship', 'Tax residency', 'Tax identification number (TIN)', and 'NZ prescribed investor rate (PIR)'. The 'Legal first name' and 'Legal last name' fields are also present but not highlighted. At the bottom of the form, there is a 'Can't find city? Enter manually' link. At the top of the form, there are two buttons: '< Back to notifications' and 'Skip, I'll do it later'.

How do I create a new investing entity?

7. Add the investor details of the second individual (individual 2), then submit the form.
8. Great, you've now finished setting up an investing entity!

The screenshot shows a web form titled "Add an investing entity". On the left, there is a sidebar with a "To complete" section containing "Add an investing entity" and "Verify your Identity", and a "Need help?" section with a "Contact us" link. The main form area has a "Back to notifications" button at the top left and a "Skip, I'll do it later" button at the top right. The form fields are as follows:

- Investing entity type:** A dropdown menu with "Joint Individual" selected.
- Investor details (individual 2):** A section containing several fields, each highlighted with a red box:
 - Legal first name:** A text input field.
 - Legal last name:** A text input field.
 - Email address:** A text input field.
 - City of birth:** A text input field with a link "Can't find city? Enter manually".
 - Current residential address:** A text input field with a link "Can't find your address? Enter address manually".
 - Phone number:** A dropdown menu with "+64" selected and a text input field.
 - Primary citizenship:** A dropdown menu with "Please select" selected.
 - Tax residency:** A dropdown menu with "Please select" selected.
 - Tax identification number (TIN):** A text input field.
 - NZ prescribed investor rate (PIR):** A dropdown menu with "Please select" selected.
 - Resident withholding tax (RWT) rate:** A dropdown menu with "33%" selected.
 - Frequency of investment:** A dropdown menu with "Please select" selected.
 - Source of funds:** A dropdown menu with "Please select" selected.
 - Funds available for investment:** A dropdown menu with "Please select" selected.
 - Reason for investing:** A dropdown menu with "Please select" selected.
- Buttons:** At the bottom, there are two buttons: "Back" and "Submit". The "Submit" button is highlighted with a red oval.