

OCTAGON INVESTOR PORTAL: QUICK REFERENCE GUIDE

This guide is intended to help authorised users of an investment entity to navigate through the Octagon investor portal and set up instructions directly in the portal.

Note: Those that have been provided view only access and are not authorised to act on behalf of the entity will still see the same screen but will not be able to edit or create instructions in the portal.

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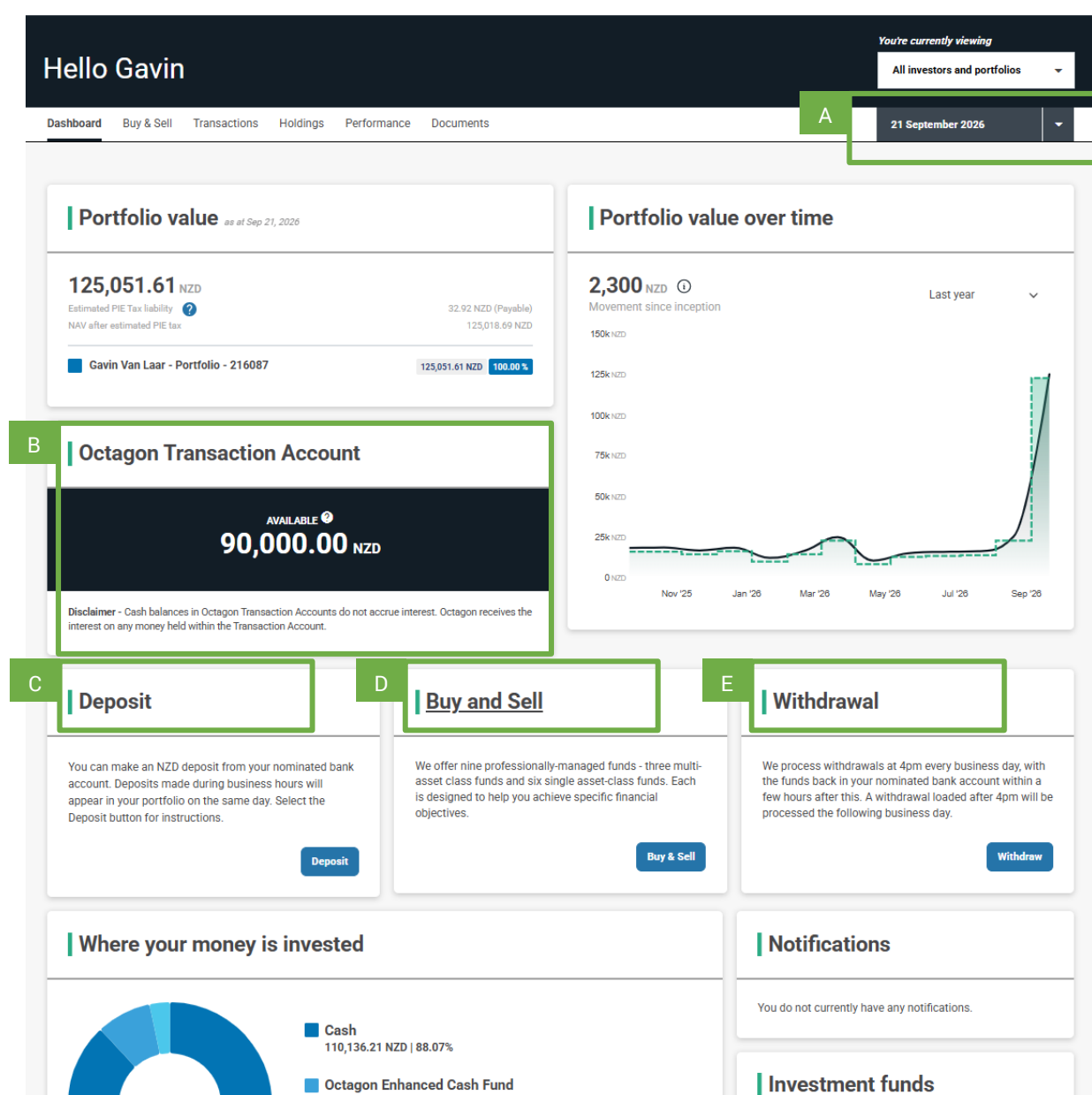
1 Portal Dashboard

After logging into the portal, you will be navigated to your investor dashboard – which provides you with an overview of your portfolio's current position and performance over time.

The dashboard will default to show you your positions as to the current date. If you wish to see a historic position, you can use the date filter to specify the date required (See box 'A' in screenshot below)

You will also see widgets to access the:

- **Transaction Account** balance (Box B)– reflects any available cash within your portfolio
- **Deposit** information (Box C)– where you can see the bank account to pay funds into and your unique identifier reference
- **Buy and Sell** tab (Box D) – where you can instruct new trades
- **Withdrawal** tab (Box E) – where you can instruct withdrawals directly from the funds or from your cash wallet.
- **Performance** – shows performance over time. You can drill down further via the 'Performance' tab.



2 Making a Deposit

The Deposit widget is a quick reference tool, where you can see the bank account details you need to use when making a deposit.

Deposit

×

Use the bank account number and reference below when making an NZD bank deposit. The reference is unique to your Octagon account and the money will be available to be invested once the deposit has been received.

Bank Account Number

02-1269-0043796-00

Copy

Reference

Copy

OK

Using Registered Bill Payee

The bank account for Octagon Funds has been set up as a registered bill payee, which will be available from your banking application.

- **Bank Payee Name:** Octagon Funds – Adminis Custodial Nominees Limited
- **Reference:** Please your unique investor reference

It is important to include your unique reference code (shown in the 'Reference' field of the Deposit widget) on your bank deposit, so that it can be easily identified and allocated to your account.

Entering the bank account details manually

If you prefer to enter the bank account details manually, please note:

1. The bank account is held under our Custodian's name, Adminis Custodial Nominees Limited. This should be used to ensure a full match for the banking apps.
2. You will still need to provide your unique reference code (shown in the 'Reference' field of the Deposit widget) on your bank deposit, so that it can be easily identified and allocated to your account.

3 Buying and selling units

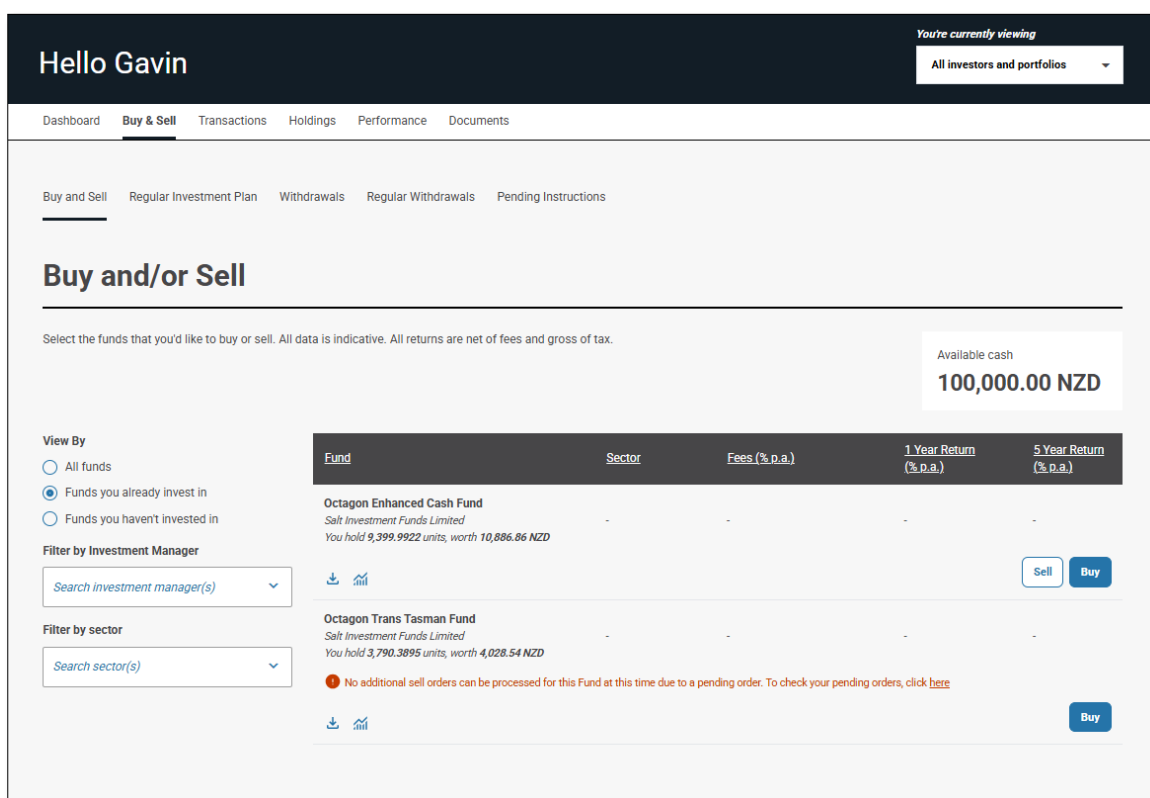
Once your deposited funds have been loaded into your account, you can instruct your buys and sells directly from the investor portal.

This can be accessed from the top navigation pane or via the 'Buy and Sell' widget on the dashboard.

To create a Buy or Sell order:

1. Navigate to the Buy and Sell screen and use the 'View by' filter to select the view of funds you want to invest in.
2. Click the blue 'Buy' or 'Sell' button to create the instruction.

Note: If you have existing pending order being processed for a given fund, then you will not be able to instruct another buy/sell until that is completed



Hello Gavin You're currently viewing: All investors and portfolios

Dashboard **Buy & Sell** Transactions Holdings Performance Documents

Buy and Sell Regular Investment Plan Withdrawals Regular Withdrawals Pending Instructions

Buy and/or Sell

Select the funds that you'd like to buy or sell. All data is indicative. All returns are net of fees and gross of tax.

Available cash: **100,000.00 NZD**

View By

- ☐ All funds
- ☒ Funds you already invest in
- ☐ Funds you haven't invested in

Filter by Investment Manager

Filter by sector

Fund	Sector	Fees (% p.a.)	1 Year Return (% p.a.)	5 Year Return (% p.a.)
Octagon Enhanced Cash Fund Salt Investment Funds Limited You hold 9,399.9922 units, worth 10,886.86 NZD	-	-	-	-
Download Chart				
Sell Buy				
Octagon Trans Tasman Fund Salt Investment Funds Limited You hold 3,790.3895 units, worth 4,028.54 NZD	-	-	-	-
⚠️ No additional sell orders can be processed for this Fund at this time due to a pending order. To check your pending orders, click here				
Download Chart				
Buy				

3. When you select the amount, you will also be prompted to download and read the Product Disclosure Document before initiating the order.

When you click on the 'Product Disclosure' link, a copy of the file will be saved to your downloads in your web browser.

Once you have populated the amount and ticked the declaration, the 'Buy' button will be made active. Select the blue button to initiate the order.

https://octagonasset-uat11.adminis.co.nz/feature/client/buy-sell/buy-sell

Dashboard **Buy & Sell** Transactions Holdings Performance Documents

Buy and Sell Regular Investment Plan Withdrawals Regular Withdrawals Pending Instructions

Buy and/or Sell

Select the funds that you'd like to buy or sell. At least one fund must be selected.

View By

- ☐ All funds
- ☒ Funds you already invest in
- ☐ Funds you haven't invested in

Filter by Investment Manager

Search investment manager(s)

Filter by sector

Buy - Octagon Enhanced Cash Fund

You have 100,000.00 NZD available to invest.

The timeframes for Buy & Sell transactions differ by fund.

Amount (NZD)

10000.00

☐ You must download and read the [Product Disclosure](#) document

Please download and read the document.

[Cancel](#) [Buy](#)

Octagon Income Fund
Forsyth Barr Investment Management Limited
You hold 10,545.2255 units, worth 10,372.03 NZD

Available cash
100,000.00 NZD

1 Year Return (% p.a.) 5 Year Return (% p.a.)

[Sell](#) [Buy](#)

4. A prompt will appear asking you to confirm the details of your order. Select 'Confirm' to complete the order process.

Buy 10,000.00 NZD of the Octagon Enhanced Cash Fund

Confirm that you want to **buy 10,000.00 NZD of the Octagon Enhanced Cash Fund**.

i This order will become effective on the next available trade date. Trades are processed at 12pm daily and until then you can cancel. [Learn more](#)

[Cancel](#) [Confirm](#)

5. Once confirmed, the order will be created, and you will see a temporary green banner appear at the top of your screen showing the order has been created.

Octagon Asset Management

Success! You've bought 10,000.00 NZD of Octagon Enhanced Cash Fund. Your order is now pending, once processed it will appear in your portfolio.

avin.VanLaar@domain.com [Sign out](#)

6. The order will be processed on the next trading cycle and will be visible via the 'Pending Instructions'

Dashboard **Buy & Sell** Transactions Holdings Performance Documents

Buy and Sell Regular Investment Plan Withdrawals Regular Withdrawals **Pending Instructions**

Pending instructions

Your in-flight instructions. Buys, sells, one-off withdrawals, recurring withdrawal plans, and the redemption orders linked to them.

Pending orders

Buy and sell orders that have been placed and are awaiting processing or settlement.

[Place new order](#)

Date	Investor	Description	Quantity	Amount	Status	Actions
Fri 11 Sep 2026	Gavin Van Laar	Buy \$1,902.84 NZD of Octagon Trans Tasman Fund	—	\$1,902.84 NZD	Processing	Cancel
Fri 11 Sep 2026	Gavin Van Laar	Sell 10,548.0598 units of Octagon Income Fund	10,548.0598	—	Processing	Cancel
Mon 21 Sep 2026	Gavin Van Laar	Buy \$10,000.00 NZD of Octagon Enhanced Cash Fund	—	\$10,000.00 NZD	Processing	Cancel

Pending withdrawals

[New withdrawal](#)

4 Setting up/Updating your Regular Investment Plan

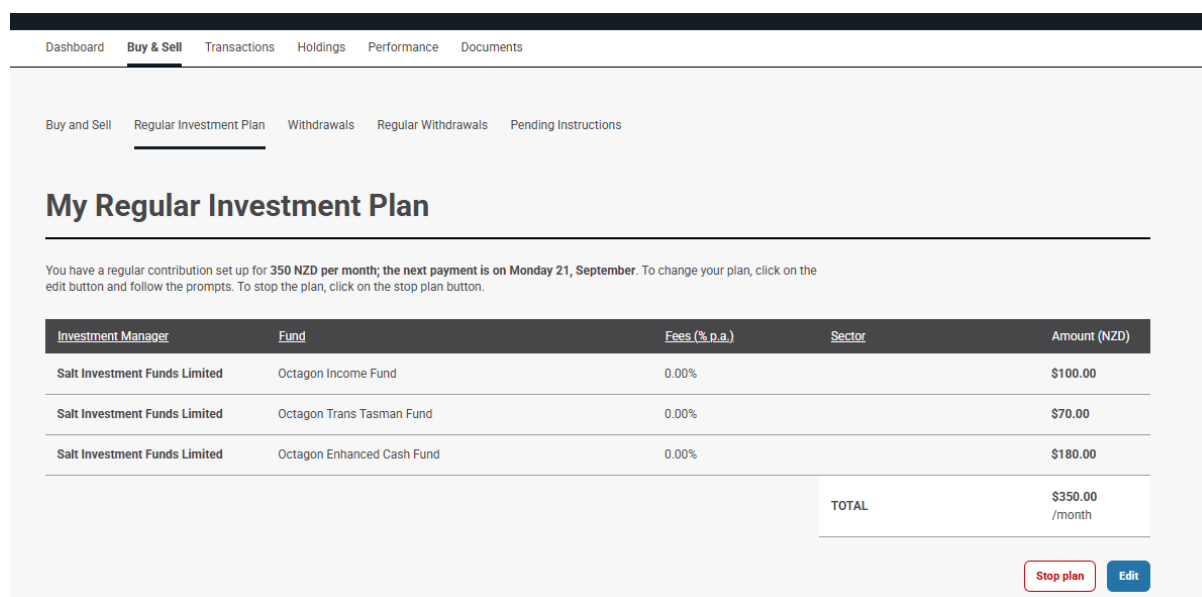
If you intend to make regular contributions, then it's best to set up a regular investment plan via the portal. This will allow you to specify the funds you want invest in and the investment allocation for each fund, based on an explicit value of the regular contribution.

Once the regular investment plan is set up, the system will automatically create and process the orders for the regular contribution received.

Please note: You will still need to set up your automatic payment with your bank to make the regular deposit into the Octagon bank account.

1. You can create or change your regular investment plan via the 'Buy & Sell' tab.

If you already have a saved plan, you can select the 'Edit' button to make changes.

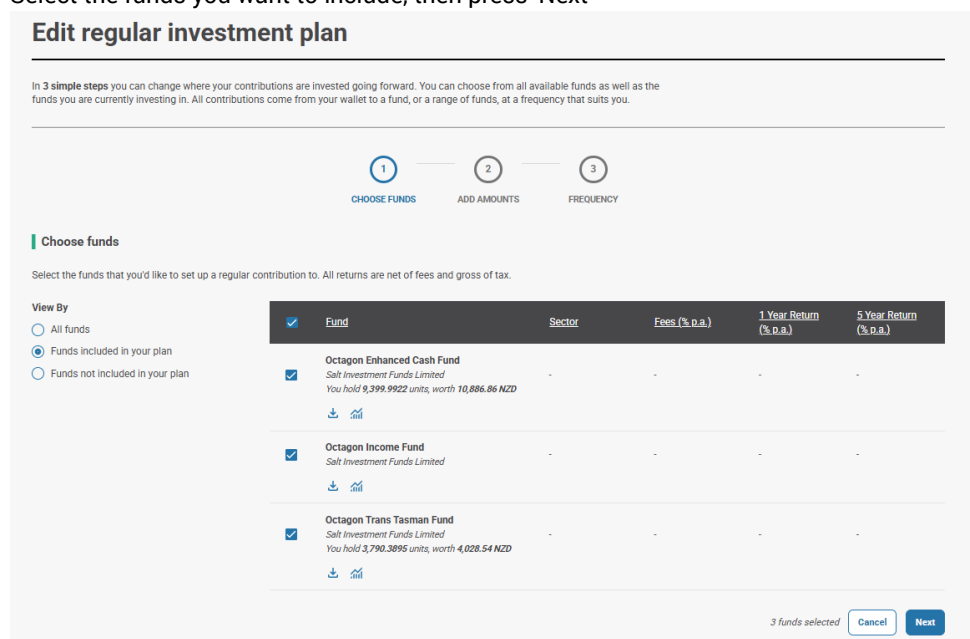


The screenshot shows the 'My Regular Investment Plan' page. At the top, there's a navigation bar with 'Dashboard', 'Buy & Sell', 'Transactions', 'Holdings', 'Performance', and 'Documents'. Below this, a sub-navigation bar includes 'Buy and Sell', 'Regular Investment Plan', 'Withdrawals', 'Regular Withdrawals', and 'Pending Instructions'. The main heading is 'My Regular Investment Plan'. Below the heading, a message states: 'You have a regular contribution set up for 350 NZD per month; the next payment is on Monday 21, September. To change your plan, click on the edit button and follow the prompts. To stop the plan, click on the stop plan button.' A table lists the investment details:

Investment Manager	Fund	Fees (% p.a.)	Sector	Amount (NZD)
Salt Investment Funds Limited	Octagon Income Fund	0.00%		\$100.00
Salt Investment Funds Limited	Octagon Trans Tasman Fund	0.00%		\$70.00
Salt Investment Funds Limited	Octagon Enhanced Cash Fund	0.00%		\$180.00
TOTAL				\$350.00 /month

At the bottom right, there are two buttons: 'Stop plan' (red) and 'Edit' (blue).

2. Select the funds you want to include, then press 'Next'



The screenshot shows the 'Edit regular investment plan' page. At the top, there's a heading 'Edit regular investment plan'. Below it, a message states: 'In 3 simple steps you can change where your contributions are invested going forward. You can choose from all available funds as well as the funds you are currently investing in. All contributions come from your wallet to a fund, or a range of funds, at a frequency that suits you.' A progress bar shows three steps: 1. CHOOSE FUNDS, 2. ADD AMOUNTS, and 3. FREQUENCY. The 'Choose funds' section is active. It says 'Select the funds that you'd like to set up a regular contribution to. All returns are net of fees and gross of tax.' There are three radio buttons for 'View By': 'All funds', 'Funds included in your plan' (selected), and 'Funds not included in your plan'. A table lists the funds:

Fund	Sector	Fees (% p.a.)	1 Year Return (% p.a.)	5 Year Return (% p.a.)
☒ Octagon Enhanced Cash Fund Salt Investment Funds Limited You hold 9,399.9922 units, worth 10,886.86 NZD				
☒ Octagon Income Fund Salt Investment Funds Limited				
☒ Octagon Trans Tasman Fund Salt Investment Funds Limited You hold 3,790.3895 units, worth 4,028.54 NZD				

At the bottom right, it says '3 funds selected' and there are 'Cancel' and 'Next' buttons.

3. Add the amounts that you want to invest in each fund, then select 'Next'

Buy and Sell
Regular Investment Plan
Withdrawals
Regular Withdrawals
Pending Instructions

Edit regular investment plan

In 3 simple steps you can change where your contributions are invested going forward. You can choose from all available funds as well as the funds you are currently investing in. All contributions come from your wallet to a fund, or a range of funds, at a frequency that suits you.

1

2

3

CHOOSE FUNDS

ADD AMOUNTS

FREQUENCY

Add amounts

Investment Manager	Fund	Fees (% p.a.)	Sector	1 Year Return (% p.a.)	5 Year Return (% p.a.)	Amount (NZD)	
Salt Investment Funds Limited	Octagon Enhanced Cash Fund View Product Disclosure	0.00 %		0.00%	0.00%	180.00	
Salt Investment Funds Limited	Octagon Income Fund View Product Disclosure	0.00 %		0.00%	0.00%	50	
Salt Investment Funds Limited	Octagon Trans Tasman Fund View Product Disclosure	0.00 %		0.00%	0.00%	170.00	
				TOTAL		\$400.00	

Cancel
Next

4. Add the frequency and start date of the regular payments, as well as end date (if required). Select 'Start'.

Buy and Sell
Regular Investment Plan
Withdrawals
Regular Withdrawals
Pending Instructions

Edit regular investment plan

In 3 simple steps you can change where your contributions are invested going forward. You can choose from all available funds as well as the funds you are currently investing in. All contributions come from your wallet to a fund, or a range of funds, at a frequency that suits you.

1

2

3

CHOOSE FUNDS

ADD AMOUNTS

FREQUENCY

Frequency

Your total regular investment plan amount will automatically be deducted from your Octagon Transaction Account at the frequency you choose below. Please make sure you have deposited sufficient funds into your Octagon Transaction Account.

Amount (NZD)

Frequency

Start date

End date

Cancel
Start

5. A prompt screen will appear to confirm the details of your regular investment plan. Complete the declaration then select 'Confirm'

Apply changes to your Regular Investment Plan

By proceeding, your Regular Investment Plan selection with the following details will commence:

- Salt Investment Funds Limited - Octagon Income Fund @ **50.00NZD**
- Salt Investment Funds Limited - Octagon Trans Tasman Fund @ **170.00NZD**
- Salt Investment Funds Limited - Octagon Enhanced Cash Fund @ **180.00NZD**

These changes will apply to your future investments only.

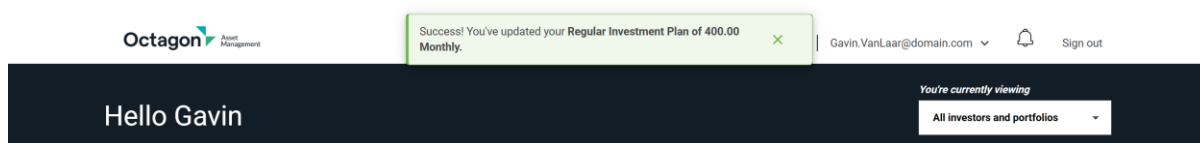
400.00 NZD will automatically be deducted from your Octagon Transaction Account monthly starting Friday 18 September. Please ensure that you have deposited sufficient funds into your Octagon Transaction Account.

Once started, you can stop your Regular Investment Plan at any time.

☐ I have read, understood and accept the latest Product Disclosure Statement(s) relevant to my chosen funds and understand that additional information about investing with Octagon is available at www.octagonasset.co.nz/ and on the [Disclose Register](#).

Cancel Confirm

6. You will see a temporary green banner appear, confirming that your plan has been updated.



5 Making a withdrawal

Withdrawals can be made directly from the funds you hold, or from the available cash within your cash wallet.

To make a withdrawal, you must have a verified bank account saved against your investor profile.

If you need to add a new bank account this can be done – see section 9.2

1. From the Buy & Sell tab within the Investor Portal:
 - a. Select the source of the withdrawal
 - b. Specify the amount or units you want to withdrawal
 - c. If you have multiple verified bank accounts, then you'll need to specify the bank account that you want the funds paid to.
If you do not see a bank account under the Nominated account, you can load a new bank account

Hello Gavin

You're currently viewing

All investors and portfolios

Dashboard Buy & Sell Transactions Holdings Performance Documents

Buy and Sell Regular Investment Plan Withdrawals Regular Withdrawals Pending Instructions

Withdrawals

Start by adding amounts to withdraw from your cash or funds.

Source

Withdraw from

☒ Available cash

☐ Funds

☐ Cash & Funds

Portfolio

Gavin Van Laar - Portfolio 216087

Available cash

90,000.00 NZD

[Clear](#)

Amount to withdraw

Reference (optional)

Nominated accounts

☒ This is a bank account
12-3456-7890123-00

☐ Check all details are correct before confirming your withdrawal.

[Withdraw](#)

Withdrawals from Available Cash are processed daily.

Buy and Sell Regular Investment Plan Withdrawals Regular Withdrawals Pending Instructions

Withdrawals

Start by adding amounts to withdraw from your cash or funds.

Source

Withdraw from

☐ Available cash

☒ Funds

☐ Cash & Funds

Portfolio

Gavin Van Laar - Portfolio 216087

Reference (optional)

Nominated accounts

☒ This is a bank account
12-3456-7890123-00

☐ Check all details are correct before confirming your withdrawal.

[Withdraw](#)

Fund	Units held	Value (NZD)	Withdraw Units	Withdraw Value (NZD)
The withdrawal will be processed when all created sell orders have been completed. The exact amount may vary based on market conditions. When a fund is included in a withdrawal, it will be unavailable for further withdrawals until that fund's sell order has been completed.				
Octagon Trans Tasman Fund Forsyth Barr Investment Management Limited	1,985.4492	2,154.76 NZD	Units	Amount
Octagon Listed Property Fund Forsyth Barr Investment Management Limited	733.6751	1,676.50 NZD	Units	Amount
Octagon Global Equities Fund Forsyth Barr Investment Management Limited	104.7949	250.20 NZD	Units	Amount
Octagon Enhanced Cash Fund Forsyth Barr Investment Management Limited	9,399.4563	10,872.61 NZD	Units	Amount
No additional sell orders can be processed for this fund at this time due to a pending order. To check your pending orders, click here				
Octagon Income Fund Forsyth Barr Investment Management Limited	10,545.2255	10,372.03 NZD	Units	Amount

- Once complete, select 'Withdraw' button to confirm the withdrawals.

Withdrawals

Start by adding amounts to withdraw from your cash or funds.

Source
Withdraw from

☐ Available cash

☐ Funds

☒ Cash & Funds

Reference (optional)

Nominated accounts

☒ This is a bank account
12-3456-7890123-00

☐ Check all details are correct before confirming your withdrawal.

Withdraw

Portfolio

Gavin Van Laar - Portfolio 216087

Available cash
90,000.00 NZD

Clear

Total amount to withdraw
400.00 NZD

Amount to withdraw

Withdrawals from Available Cash are processed daily.

Fund	Units held	Value (NZD)	Withdraw Units	Withdraw Value (NZD)
The withdrawal will be processed when all created sell orders have been completed. The exact amount may vary based on market conditions. When a fund is included in a withdrawal, it will be unavailable for further withdrawals until that fund's sell order has been completed.				
Octagon Trans Tasman Fund <i>Forsyth Barr Investment Management Limited</i>	1,985.4492	2,154.76 NZD	Units	Amount
Octagon Listed Property Fund <i>Forsyth Barr Investment Management Limited</i>	733.6751	1,676.50 NZD	-87.5247	200.00 Clear
Octagon Global Equities Fund <i>Forsyth Barr Investment Management Limited</i>	104.7949	250.20 NZD	Units	Amount
Octagon Enhanced Cash Fund <i>Forsyth Barr Investment Management Limited</i>	9,399.4563	10,872.61 NZD	Units	Amount
No additional sell orders can be processed for this fund at this time due to a pending order. To check your pending orders, click here				
Octagon Income Fund <i>Forsyth Barr Investment Management Limited</i>	10,545.2255	10,372.03 NZD	Units	Amount

- A temporary green banner will appear on your screen to show that your withdrawal has been created. This will be visible in the pending transactions tab.

Withdrawals

Start by adding amounts to withdraw from your cash or funds.

Success! Your withdrawal from available cash and funds has been created.

6 Setting up a Regular Withdrawal

You can also set up regular withdrawals from your account. These will be funded through redemption of funds which are automatically sold in advance of the withdrawal date.

To make a regular withdrawal – Go to the 'Buy & Sell' tab and select the 'Regular Withdrawals' section.

The process is similar to creating a one-off withdrawal, but you'll need to add the frequency, start date and optional end date.

Dashboard
Buy & Sell
Transactions
Holdings
Performance
Documents

Buy and Sell
Regular Investment Plan
Withdrawals
Regular Withdrawals
Pending Instructions

Regular Withdrawals

Regular Withdrawals will be funded through the redemption of funds that are automatically sold in advance of the withdrawal date. Once redeemed, these units are converted to cash and automatically paid to your nominated bank account in accordance with your Regular Withdrawal Instruction.

Frequency
Select a frequency

Start date
Select a date

End date (optional)
Select a date

Reference (optional)

Nominated accounts
This is a bank account
12-3456-7890123-00
Check all details are correct before confirming your withdrawal.

Start plan

Portfolio
Gavin Van Laar - Portfolio 216087

Fund	Units held	Value (NZD)	Withdraw Units	Withdraw Value (NZD)
Octagon Trans Tasman Fund Salt Investment Funds Limited	3,790.3895	4,028.54 NZD	Units	Amount
Octagon Enhanced Cash Fund Salt Investment Funds Limited	9,399.9922	10,886.86 NZD	Units	Amount

The withdrawal will be processed when all created sell orders have been completed. The exact amount may vary based on market conditions. When a fund is included in a withdrawal, it will be unavailable for further withdrawals until that fund's sell order has been completed.

As with the one-off withdrawals, a temporary green banner will appear to confirm that you have successfully created your regular withdrawal.

Buy and Sell
Regular Investment Plan
Withdrawals
Regu

Success! Your regular withdrawal from funds has been created.

The system will automatically trigger redemption orders 3 days prior to the withdrawal date to sell down the required units and fund the withdrawal. Once the redemption has settled, then withdrawal payment will be made to the nominated bank account, and email confirmation will be sent to the investor.

7 Other portal features

The Investor Portal also allows you to view your transactions, holdings and portfolio performance. You can access these pages via the top navigation panel.

Portfolio Holdings

The holdings page shows you a breakdown of your portfolio by asset, defaulting to the current date. You can change the date range in the top right corner of the table.

Hello Gavin

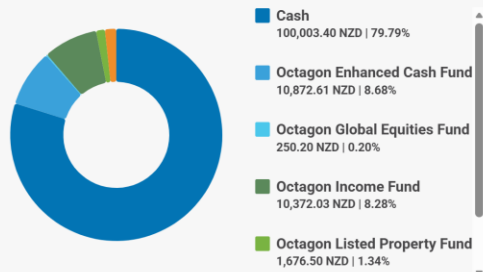
You're currently viewing

All investors and portfolios

Dashboard Buy & Sell Transactions **Holdings** Performance Documents

Total Holdings
NZD 125,329.50

Asset Allocations Asset Type Currency Liquidity



☐ Fixed Income ☒ Valuation ☐ Return

Date range

7 September 2026

Name	Currency	Qty	Cost Price	Price	Price Date	Market Value	FX Rate	NZD Value	Weight
▼ Cash								100,003.40	79.79%
Custody Cash - New Zealand Dollar	NZD					100,000.00	1.0000	100,000.00	79.79%
Fee Rebates Receivable	NZD					3.40	1.0000	3.40	0.00%
▼ Australian Equities								2,154.76	1.72%

Portfolio Performance

The performance page allows you to see how your holdings have performed over time. This will provide a breakdown of cash movement, returns, tax and any fees. Use the filter box to specify time periods and parameters as required.

Dashboard Buy & Sell Transactions Holdings **Performance** Documents

Filter 1 year ending September 7, 2026

Portfolio value
125,329.50 NZD

Overview 1 year ending September 7, 2026

Total investment ⓘ
106,972.69 NZD

Returns
3.86%

Month 0.32%
3 Years 5.50% p.a.

Quarter 1.43%
Since Inception 5.26% p.a.

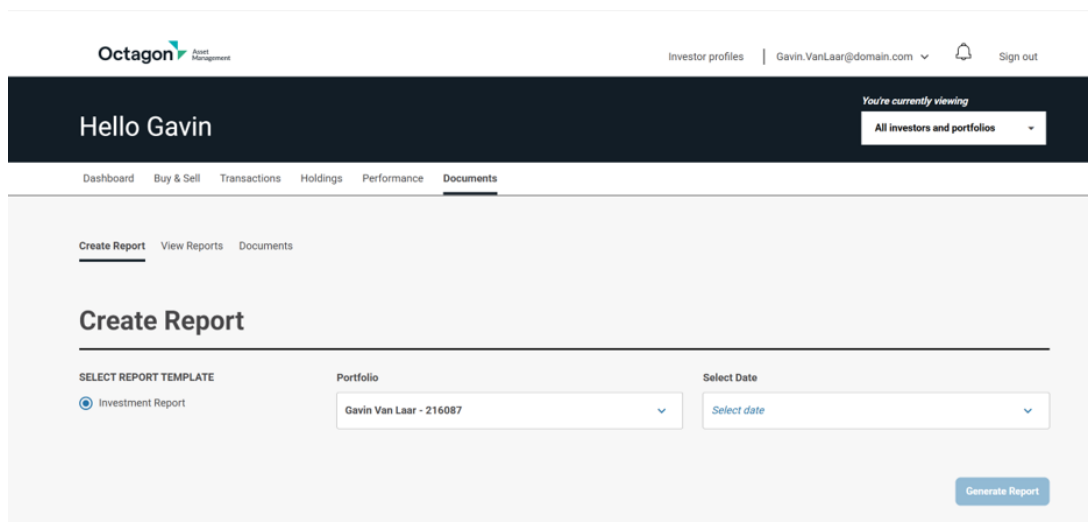
12 Months 3.86%

Returns breakdown 1 year ending September 7, 2026

Opening value	NZD 17,859.52
▼ Capital Movements	NZD 106,972.69
Withdrawals and Transfers Out	NZD -51,530.50
Deposits and Transfers In	NZD 158,503.19
▼ Total Returns Before Tax	NZD 619.43
> Realised Gains	NZD 681.67
> Unrealised Gains	NZD -330.96
> Revenue	NZD 268.72
▼ Tax	NZD -122.14
Tax Paid	NZD -122.14

8 Creating an investment report

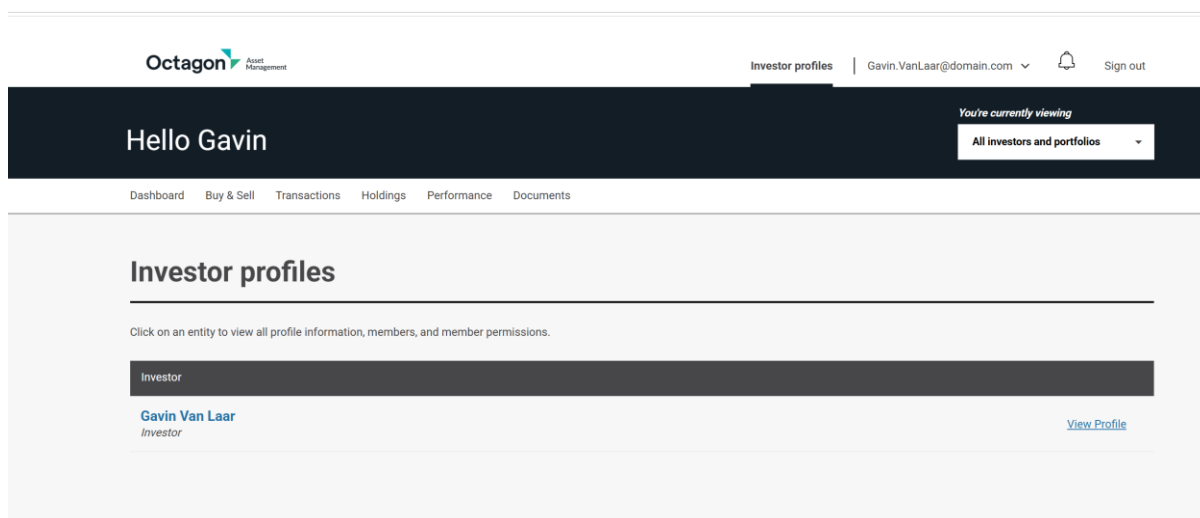
An investment report can be generated from the 'Document' tab. This will provide you with a pdf report, which can provide a statement summary, portfolio returns, transactions and other optional data. You can select what data you want to show and specify a time period. The report will appear in the 'View Reports' section



9 Updating your details

9.1 UPDATING YOUR INVESTOR DETAILS

To update your investor details – click the 'Investor profiles' at the top of your page. The screen will show you a list of investor profiles that your user account has been linked to.



Click on 'View profile' for the investor entity that you want to update, and this will open the investor details. Any items with the pencil icon can be updated in the system, and will be sent to the Octagon team for review.

You will see tabs to the right of the 'Investor details' to view and update bank accounts and members.

Investor Profiles

Gavin Van Laar profile

Investor details
Bank accounts
Members

Some fields require supporting documentation and a review and approval by Octagon before the change will be reflected in your investor profile. You can track these requests under pending approvals at the bottom of the page.

Investor information

Full name

Gavin Van Laar

Identifier

4GZRSWCZ

Status

Active

Legal type

Individual

Country

New Zealand

Address

Postal address

Tax information

Tax number

059436805

Tax residence

New Zealand

Tax rate

39%

Prescribed Investor Rate (PIR)

28%

Administration

Distribution method

Reinvest

Advisor name

9.2 ADDING A NEW BANK ACCOUNT TO YOUR ACCOUNT

To add a bank account, go to the 'Bank accounts' tab within the investor profile, then select 'Add another bank account'.

Investor Profiles

Gavin Van Laar profile

Investor details
Bank accounts
Members

To add or update your bank account(s), submit supporting documentation. This requires a review and approval. You can track your request status under pending approvals at the bottom of the page.

Bank	Account Name	Account Number	Investor	
BANK	This is a bank account	12-3456-7890123-00	Gavin Van Laar	View

[Add another bank account](#)

To add a new bank account please contact us via email at info@octagonasset.co.nz. You will need to provide a bank statement for your new bank account and the bank account needs to be in the name of the Octagon account. The bank statement can be downloaded through your online banking.

Complete the bank account details, then select ok. You will also be prompted to upload proof of bank account for review by the Octagon team before it can be used.

Add Bank Account

Enter the bank account details and upload supporting documents for review and approval. You can track your request status under pending approvals at the bottom of the page.

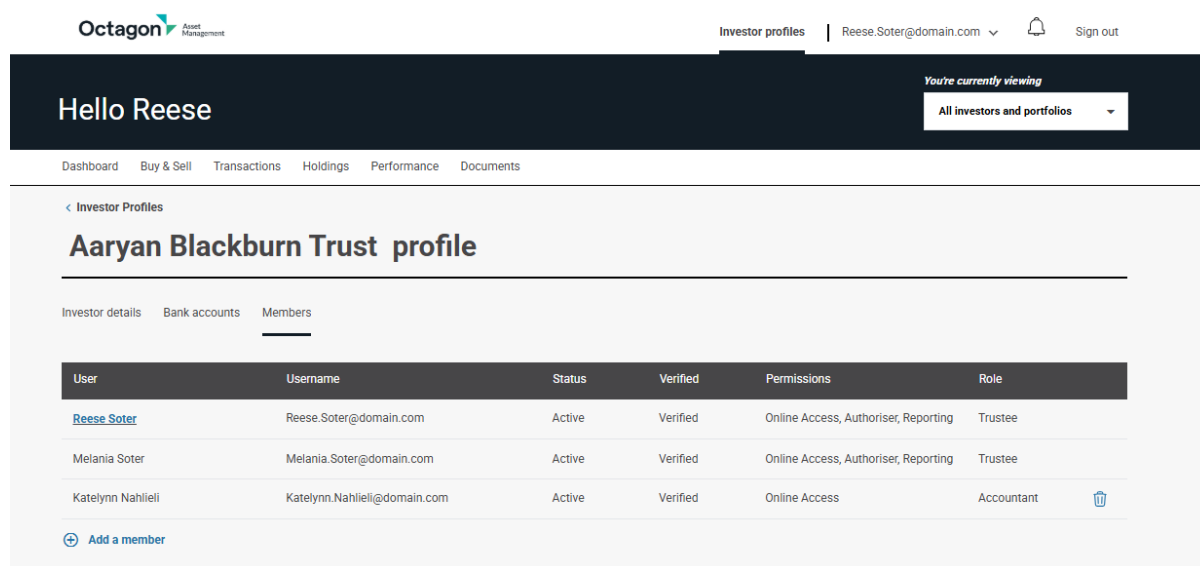
Investor	Bank
Gavin Van Laar	
Account Name	Account Number
Reference	Currency
	NZD
Supporting Documents	
 Drag and drop files here or Click here to upload Supported: JPG, JPEG, PNG, TIFF, PDF	
Cancel Confirm	

9.3 ADDING OR REMOVING USERS FROM YOUR ACCOUNT

Within the Investor profile, authorised users can view all existing members of an investment entity and have the permissions to:

1. Add a new member (with view only access) to your account.
2. Remove an existing member (with lower permissions than themselves)

Any other changes to members (e.g. upgrading their permissions or removing a member with the same permissions) needs to be instructed through the Salt administration team.



Octagon Asset Management

Investor profiles | Reese.Soter@domain.com | Sign out

Hello Reese

You're currently viewing: All investors and portfolios

Dashboard Buy & Sell Transactions Holdings Performance Documents

< Investor Profiles

Aaryan Blackburn Trust profile

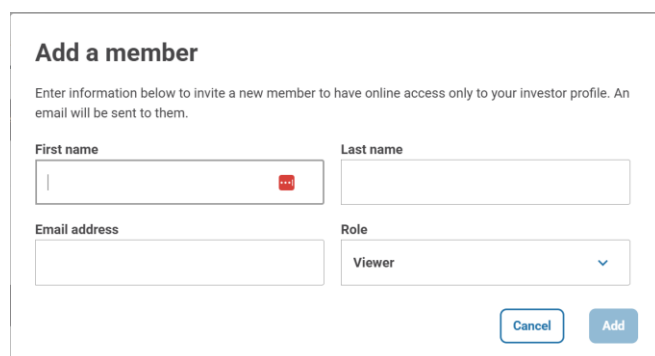
Investor details Bank accounts **Members**

User	Username	Status	Verified	Permissions	Role
Reese Soter	Reese.Soter@domain.com	Active	Verified	Online Access, Authoriser, Reporting	Trustee
Melania Soter	Melania.Soter@domain.com	Active	Verified	Online Access, Authoriser, Reporting	Trustee
Katelynn Nahlieli	Katelynn.Nahlieli@domain.com	Active	Verified	Online Access	Accountant

[Add a member](#)

9.3.1 Add a new member to your account

Select the 'Add a member' then complete the required details.



Add a member

Enter information below to invite a new member to have online access only to your investor profile. An email will be sent to them.

First name

Last name

Email address

Role

[Cancel](#) [Add](#)

The user will be invited via email to access and view your account.

If a user requires elevated permissions (e.g. authoriser or recipient of reporting) – After the user has accepted the invitation, please contact the Salt administration team to instruct them to update the user's permissions

9.3.2 Remove an existing member from your account

When you view the member list, authorised users will have ability to remove members that have lower permissions than them. Simply select the bin icon  to the right of the relevant member's record.

If the member has the same permissions as you, then an authorised person for the investment entity will need to instruct the Octagon Administration team to get them to make any changes to this user.