Mercer | PORTFOLIO SERVICE

INVESTOR WEBSITE

MERCER PORTFOLIO SERVICE'S INVESTOR WEBSITE AT A GLANCE

Mercer Portfolio Service's intuitive website makes it easy for you to keep track of your portfolio. The site is optimised to provide you with full access to your portfolio on a range of devices – including tablet, laptop and PC.

EASY PORTFOLIO MONITORING

Through Mercer Portfolio Service, you have access to a comprehensive range of information about your portfolio, including:

- **a portfolio summary**, which allows you to see the financial position of each account within your portfolio, including investment holdings, cash and pending transactions
- **a comprehensive range of reports** including account transactions, asset allocation, performance, income and more
- **ongoing account notifications** so you won't miss key events, such as upcoming regular contributions and pension payments, expiring beneficiary nominations and maturing term deposits
- **an interactive portfolio balance chart** that shows the balance of your accounts over a chosen date range.

TOTAL CONVENIENCE

You'll also enjoy convenient access to useful tools and information through:

- **links to the list of managed funds** and ASX-listed securities available in Mercer Portfolio Service, as well as training materials and FAQs
- **our forms library** where you can download and complete forms for common requests like beneficiary nominations, direct debits/credits and super fund nominations
- **the latest Centrelink Schedule** (if you have a pension account), which is available to view and download directly from the site.

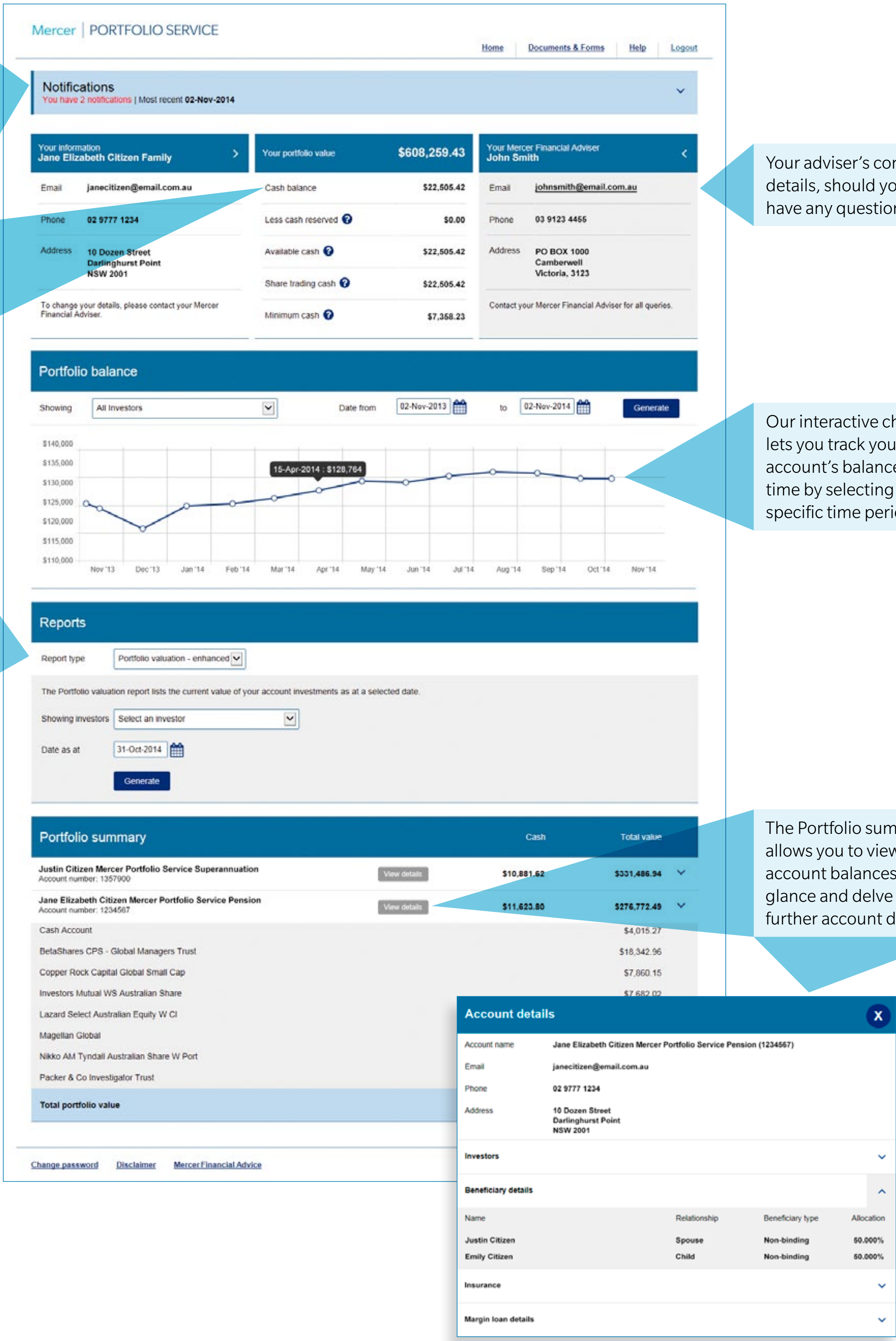
FEATURES THAT HELP YOU KEEP TRACK OF YOUR PORTFOLIO

Mercer Portfolio Service's range of features and intuitive design helps you monitor your portfolio easily and efficiently.

Notifications provide reminders about key events relating to your account, so you know what's coming up.

See your portfolio's current value, including cash balance, at a glance.

View and download a range of detailed reporting for your accounts.

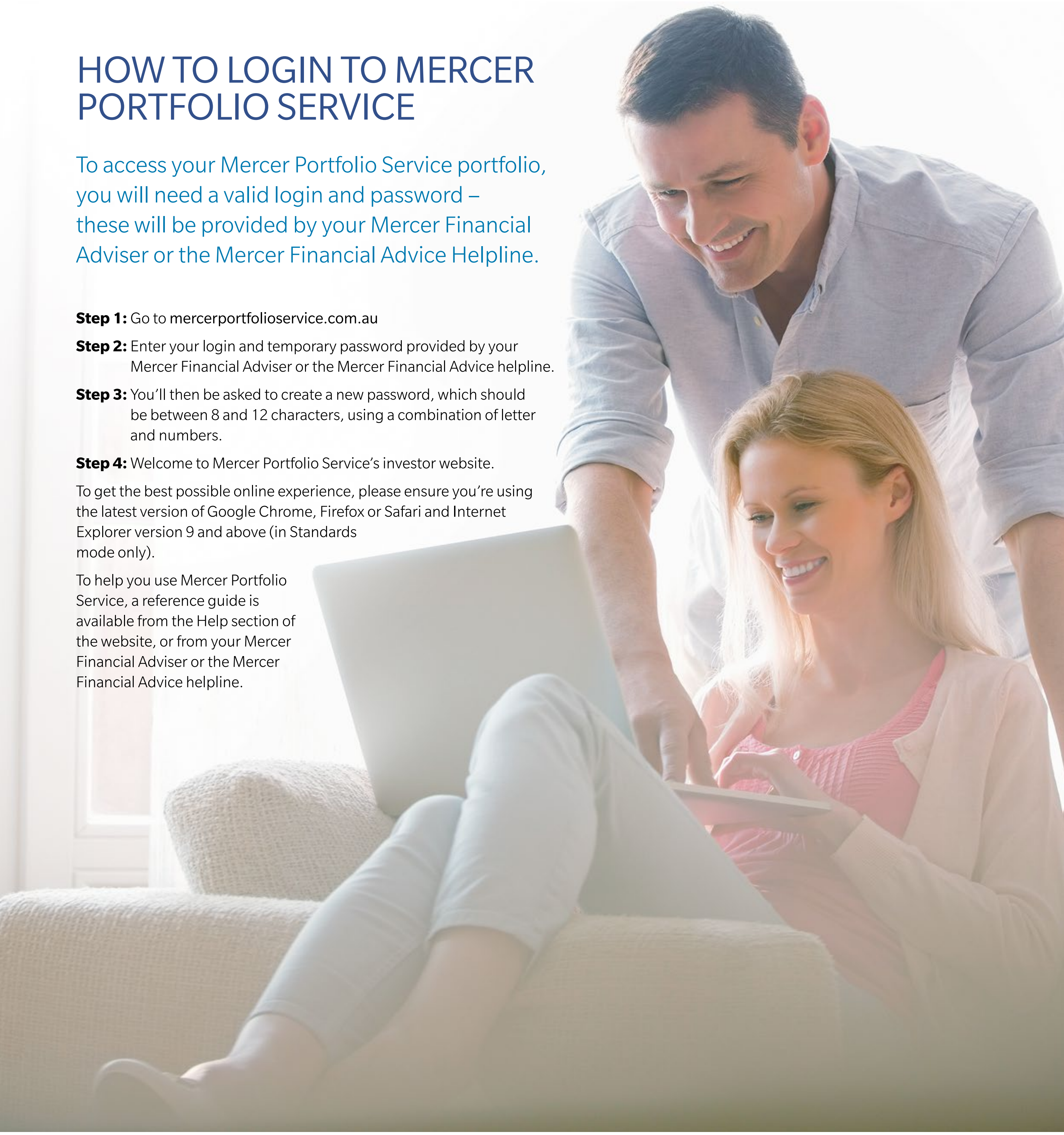


Your adviser's contact details, should you have any questions.

Our interactive chart lets you track your account's balance over time by selecting a specific time period.

The Portfolio summary allows you to view account balances at a glance and delve into further account details.

HOW TO LOGIN TO MERCER PORTFOLIO SERVICE



To access your Mercer Portfolio Service portfolio, you will need a valid login and password – these will be provided by your Mercer Financial Adviser or the Mercer Financial Advice Helpline.

Step 1: Go to mercerportfolioservice.com.au

Step 2: Enter your login and temporary password provided by your Mercer Financial Adviser or the Mercer Financial Advice helpline.

Step 3: You'll then be asked to create a new password, which should be between 8 and 12 characters, using a combination of letter and numbers.

Step 4: Welcome to Mercer Portfolio Service's investor website.

To get the best possible online experience, please ensure you're using the latest version of Google Chrome, Firefox or Safari and Internet Explorer version 9 and above (in Standards mode only).

To help you use Mercer Portfolio Service, a reference guide is available from the Help section of the website, or from your Mercer Financial Adviser or the Mercer Financial Advice helpline.

FIND OUT MORE ABOUT MERCER PORTFOLIO SERVICE

If you would like any further information on Mercer Portfolio Service, please contact your Mercer Financial Adviser or the Mercer Financial Advice Helpline on 1300 793 518.