

The PPS Investments Family Network

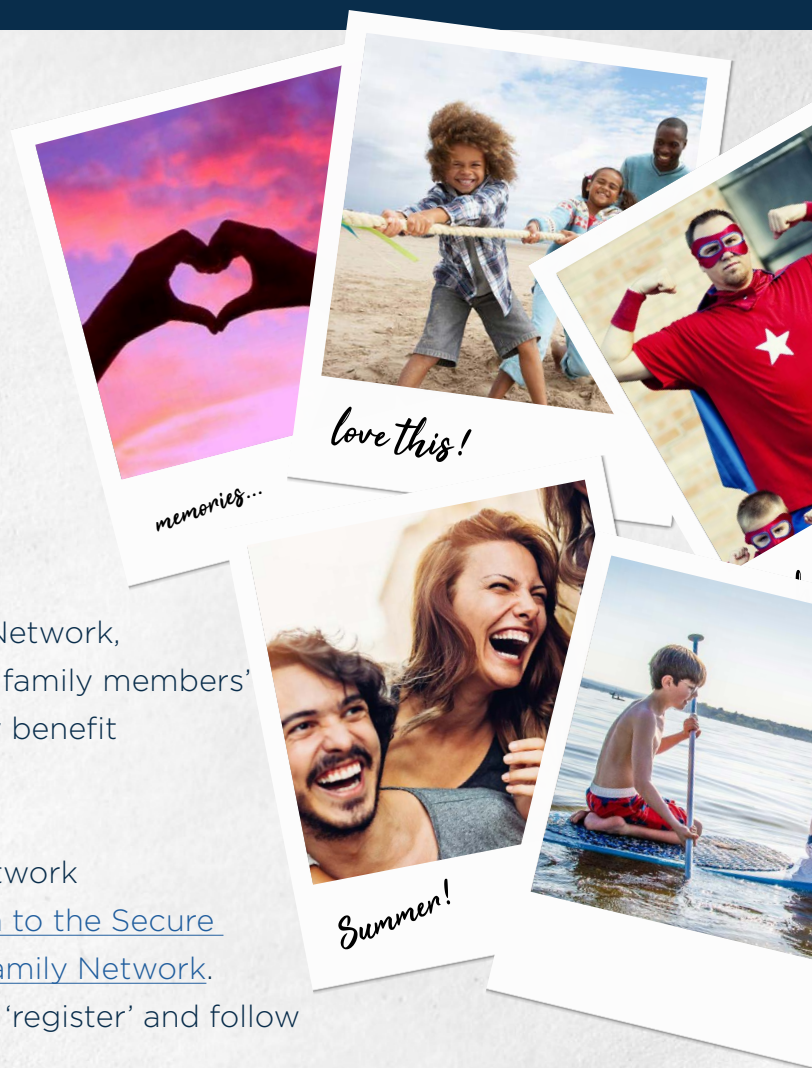
Welcome to the PPS Investments Family Network, where you can assist clients connect their family members' investments on our platform to potentially benefit from a reduced family administration fee.

As an adviser, you can create a Family Network on the PPS Investments Secure Site. [Login to the Secure Site, to create and manage your client's Family Network.](#) If you're not a registered user, simply click 'register' and follow the prompts to create a profile.

Once you have logged onto the Secure Site, you can access everything from your dashboard.



3) This icon indicates if a client has a network in place.



1) Click on the 'Client' icon in the left-hand menu to access your clients investment portfolios on our platform.

2) From this view, you can access each client's profile, hover over the arrow in the right-hand corner and clicking on 'Open'.

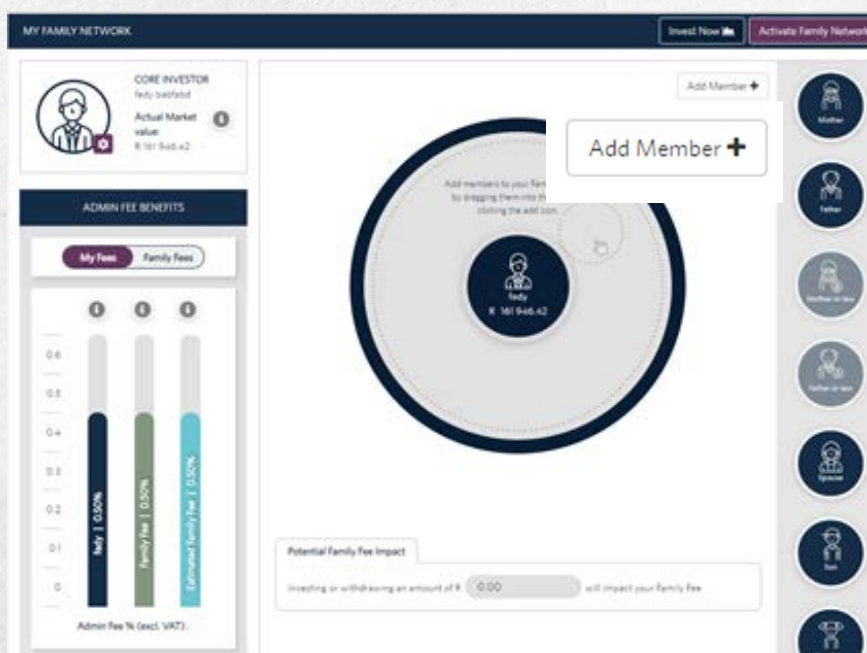


How to create a Family Network



4) Once you're logged in, you'll see your client's dashboard showing an overview of their PPS Investments portfolio.

5) You can then access the Family Network tool for this particular client by clicking on the icon at the top right hand corner.



The client's personal information, including their market value will be pre-populated on this screen.

6) To create a Family Network on behalf of a client, you start by adding the client's family members.

7) Click on the 'Add Member' button and follow the prompts.

Activating a Family Network

When you login to the PPS Investments Secure Site, you can:

- **Create and manage** your client's Family Network
- **Add family members** to create your client's Family Network
- **Invite family members** to connect to your client's Family Network
- **Determine family administration fee** based on the family market value



Core investor

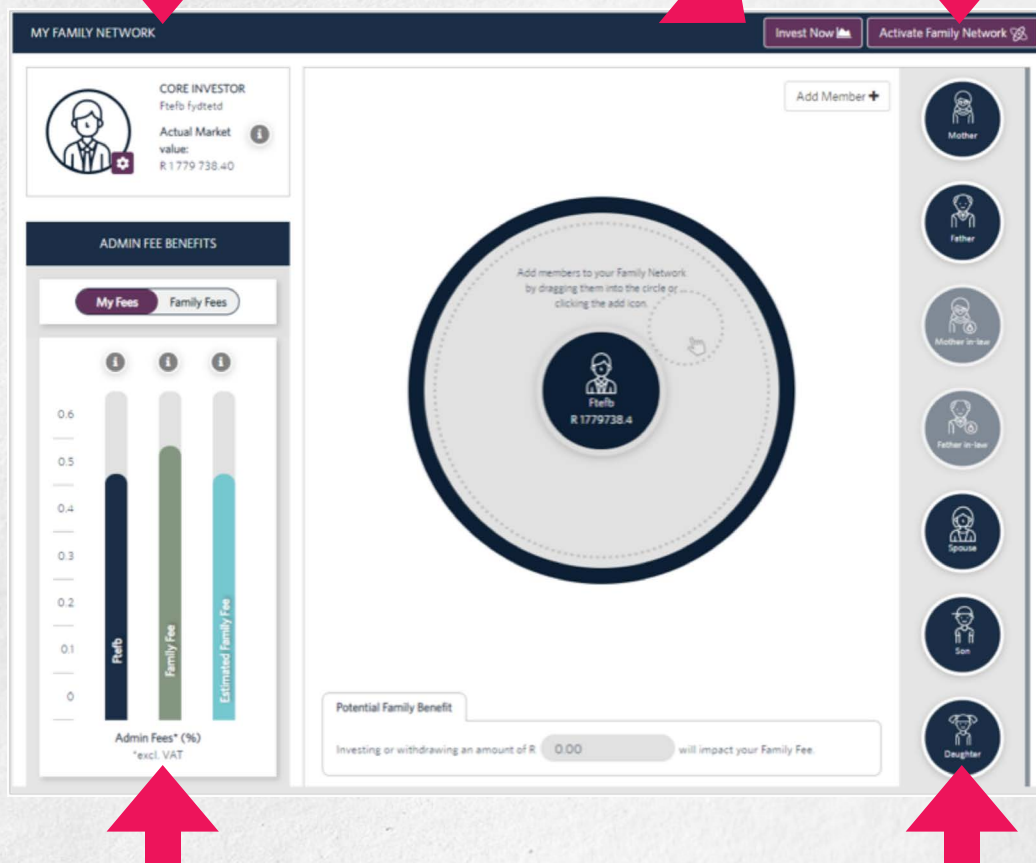
Your client is the core investor, their market value will be pre-populated here.

Invest now

You can also click on 'Invest Now' to start a new investment.

Activate Family Network

When you're comfortable with your client's Family Network structure, click on 'Activate Family Network'. All their family members will be invited to join the Family Network. Encourage your client to request that their family members accept the invitation to join the Family Network.



Administrations fee benefits

Get an overview of the individual and family administration fees that could be applied to your client's family network based on the family market value. The more they save as a family, the more they could save on family administration fees.

Add/remove family members

You can start adding family members to create your client's Family Network. Drag & drop family members using the icons on the right-hand side or click on 'Add Member'. All family members' investments have to be on the PPS Investments platform to qualify for the reduced administration fee.

Contact us

For queries on the Family Network, visit www.pps.co.za/familynetwork.

If you need more information about the PPS Investments Family Network, please consult your PPS Investments Investment Specialist. Alternatively, feel free to contact us directly. Contact us on 0860 468 777 (0860 INV PPS) or at clientservices@ppsinvestments.co.za.

