

INTRODUCING MYPERPETUAL



PERPETUAL INVESTMENTS

21/07/2020

Managing your clients' investments online is getting easier. **myPerpetual** has a fresh design and is packed with new features to deliver a better online experience for you and your clients*.

Six new features to check out

1. **New look and feel**

myPerpetual has an intuitive layout and clearer navigation. You and your clients will see a graphical representation of your portfolio, pie charts of investments and simpler ways to transact.

2. **A smarter dashboard**

At a glance, the myPerpetual dashboard clearly lays out all the important information you and your clients need including portfolio value, recent transactions and current investments.

3. **Real time data**

A new data feed means you and your clients can see the most up-to-date portfolio values available. More transactions will be automated meaning faster processing times.

4. **Two-factor authentication**

As an adviser you will be protected by stronger security when completing some transactions for your clients. With extra security, you can complete more transactions on behalf of your clients.

5. **SMS confirmation**

When transactions are completed, you and your clients will receive a text message confirmation.

6. **Mobile friendly**

myPerpetual is designed to be accessed through any device – mobile, laptop or tablet – so you and your clients can keep track of their investments, no matter where you are.

How we are communicating with your clients

We're letting all clients, except Wrap clients, know that myPerpetual is coming (via their EOFY flyer sent out in July). For those clients we have a current email address for, we'll also send an email with more information in August.

Importantly, to access myPerpetual your clients will need an email address. If we don't have it already, they should let us know by:

- Calling our Investor Service Centre on 1800 022 033 during business hours
- Emailing investments@perpetual.com.au

What you need to do

The new site will have a new address, and you'll need a new username and password. In September we'll email you again all the information you need to create your account.

In the meantime, please make sure we have your clients' current email addresses by contacting us through the details above.

If you have any questions, please contact your Perpetual account manager.

*excludes Wrap

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