GENISTAR In Association With

moneyfarm

USER MANUAL

SMART TECH | TOP EXPERTS | SIMPLE INVESTING.

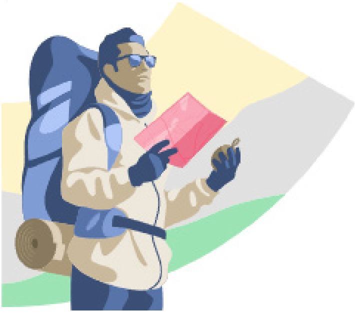
ABOUT MONEYFARM

OPENING HOURS: MON - FRI 9AM - 6PM

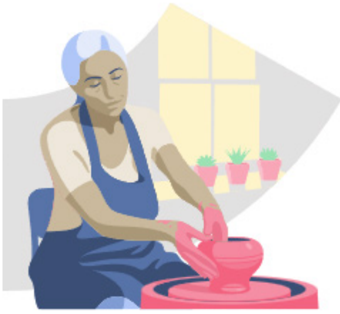
Smart tech. Top experts. Simple investing.

Simple digital investing - be confident with easy-access investing via the web or app and get digital advice tailored to your goals.

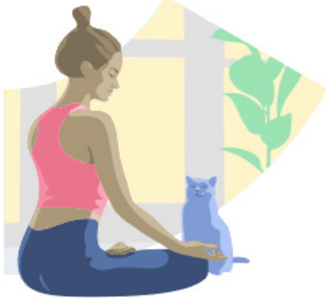
Experts for every decision - enjoy active management and holistSMAic portfolio reviews with your own investment consultant, for when you want to talk.



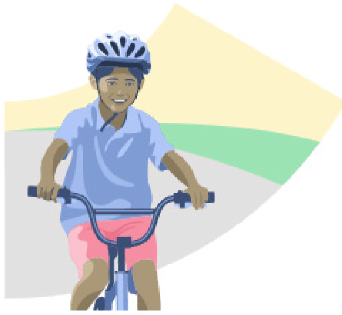
STOCKS & SHARES ISA



PRIVATE PENSION (SIPP)



GENERAL INVESTMENT ACCOUNT



JUNIOR ISA

WHY CHOOSE MONEYFARM?

» We've been growing our 80,000+ investors' portfolios for almost 10 years.
» You get a choice of 7 risk levels to choose the best option for your account.
» You'll have a dedicated consultant to answer any questions you have about your portfolio.
» We have a fantastic track record - see our performance.
» All our portfolios can be made socially responsible with our ESG offering, backed by MSCI data.

REGULATED

Moneyfarm is authorised and regulated by the UK Financial Conduct Authority (FCA).
Learn more

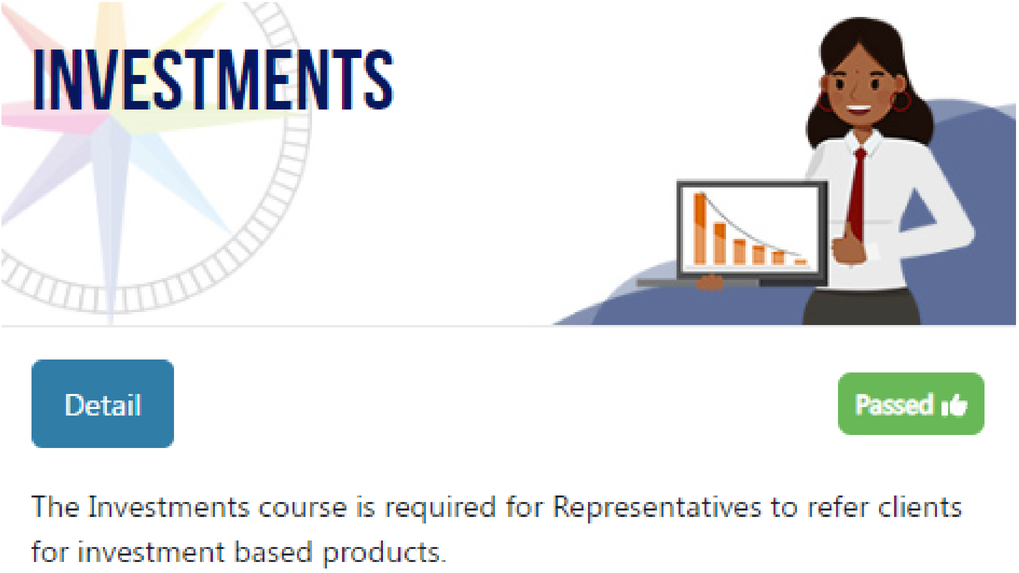
PROTECTED

Moneyfarm boasts M&G amoung its main investors. Your investments & capital remain separate from ours & are always ptotects by Saxo Bank.

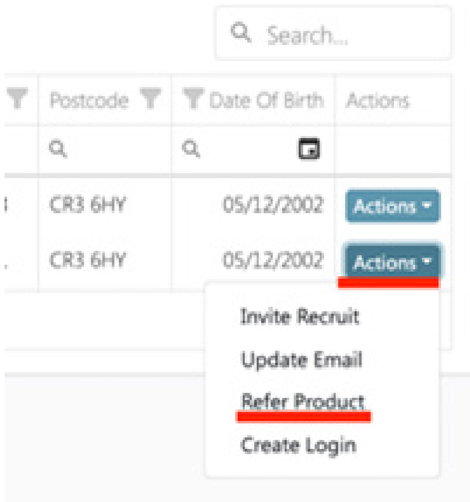
HOW TO REFER VIA GENISTAR.ONLINE

To refer on Genistar Online, please see below:

1. Ensure Investment Competency is completed and passed.

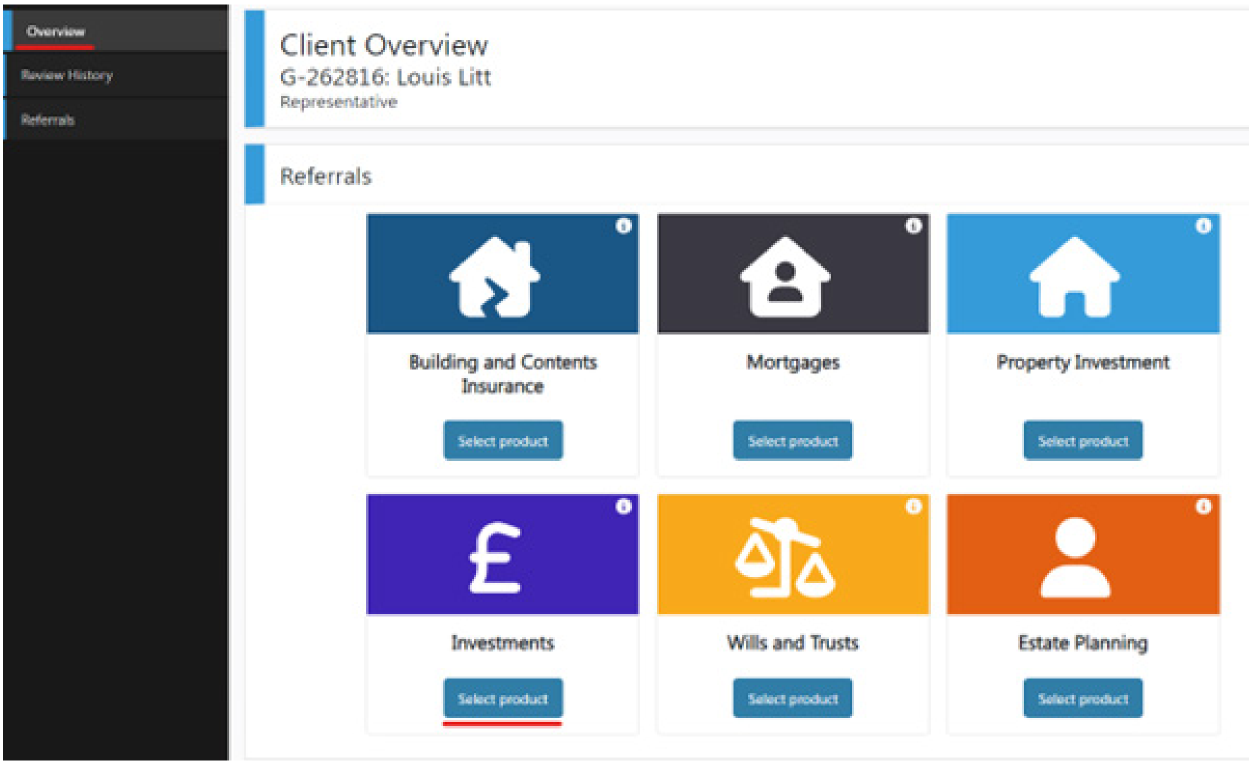


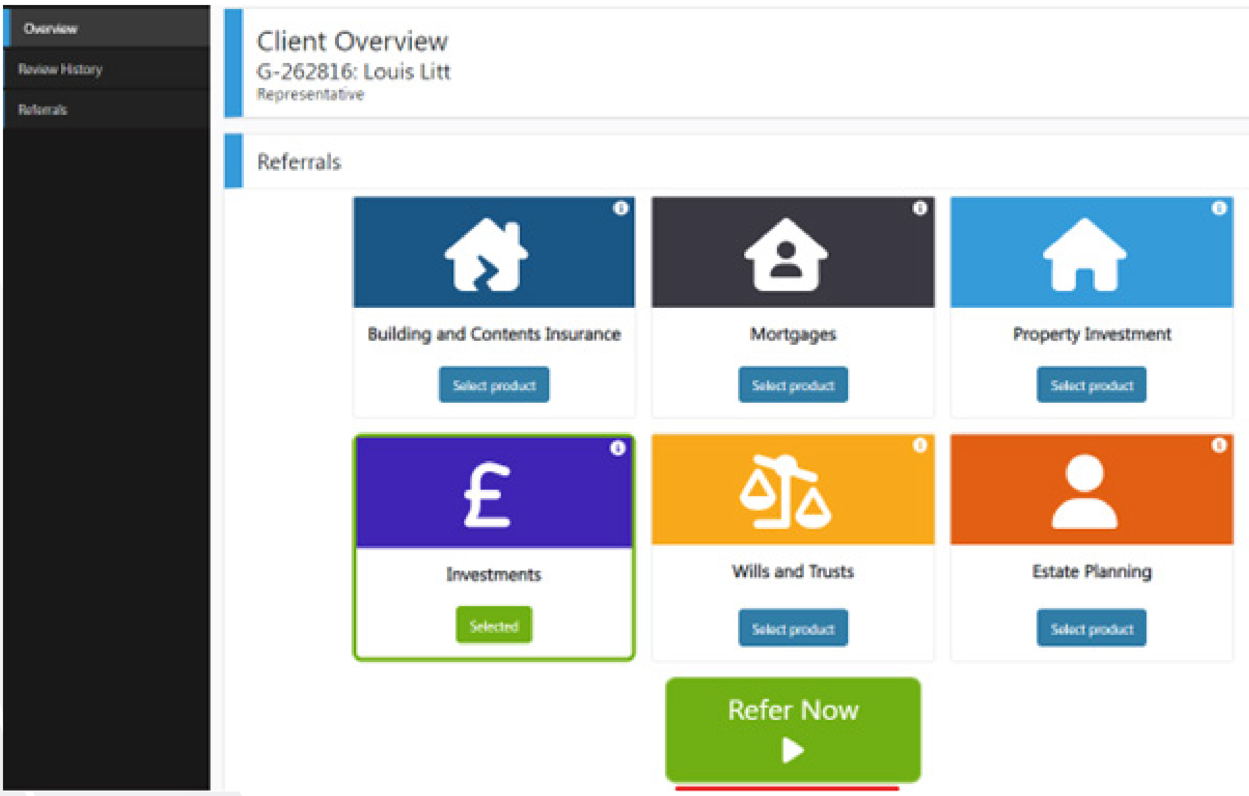
2. Search the client's name.
3. Click on Actions.
4. Click on Refer Product.



OR

2. Search Client's name
3. Click on Client Overview
4. Click on Select product
5. Click on Refer Now button


Overview
Review History
Referrals
Client Overview
G-262816: Louis Litt
Representative
Referrals
Building and Contents Insurance
Select product
Mortgages
Select product
Property Investment
Select product
Investments
Select product
Wills and Trusts
Select product
Estate Planning
Select product


Overview
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G-262816: Louis Litt
Representative
Referrals
Building and Contents Insurance
Select product
Mortgages
Select product
Property Investment
Select product
Investments
Selected
Wills and Trusts
Select product
Estate Planning
Select product
Refer Now

SELF-REFER (ALL SCENARIOS)

If you are a Rep ONLY:

- You will need to invite yourself to be a client first.
- You can then click on the Refer button, which you can access on the top right-hand corner of the Organisation tab.

If you are a Client or Partner ONLY:

- You will need to be invited as a Rep first.
- Once the IBA is approved by the FSC, you can take the B&C competency.
- You will need your servicing rep's EVP upline to change the servicing rep to yourself.
- Then you can refer the product to yourself by clicking on the Refer button which you can access on the top right-hand corner of the Organisation tab.

If you are a Rep and a Client:

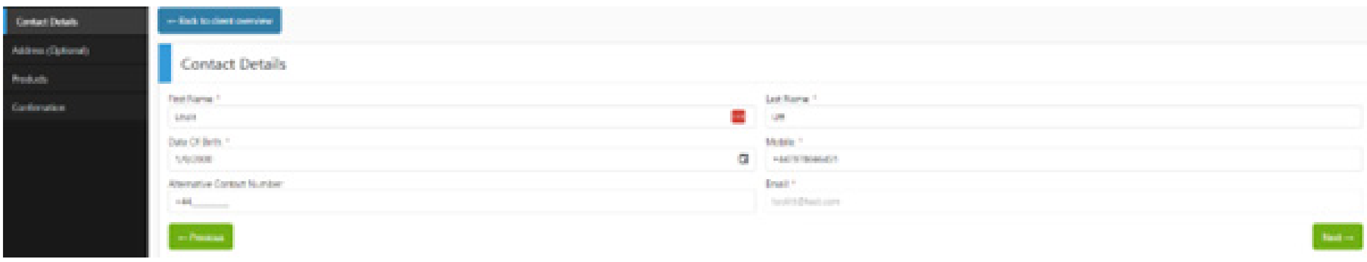
- If a different rep/EVP is your servicing rep, the servicing rep's EVP needs to change your servicing rep to you first.
- Then you can refer the product to yourself by clicking on the Refer button, which you can access on the top right-hand corner of the Organisation tab.

If you are a Rep and a Partner:

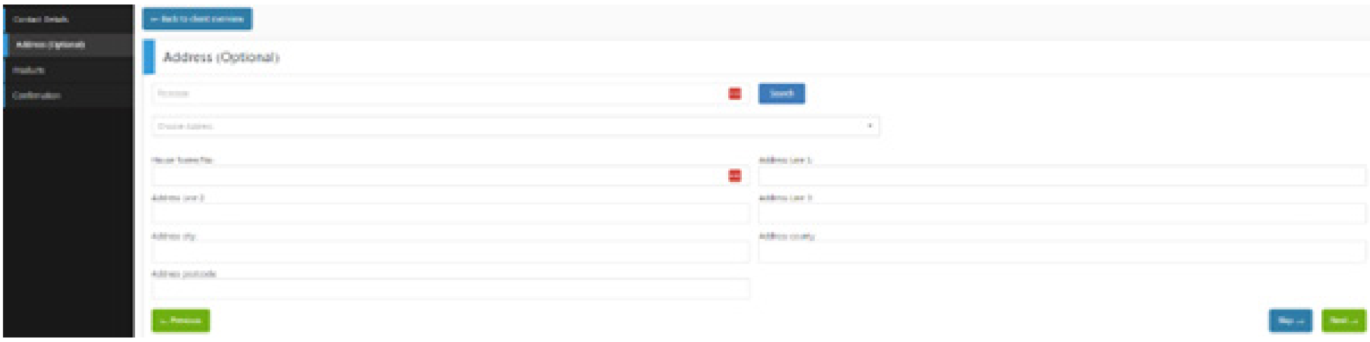
- Your EVP upline can invite you to be a client first.
- If a different rep invites you to be a client, that rep's EVP needs to change their servicing rep to you.
- The original client will automatically be listed as your partner in your fact find.
- The original client's fact find will remain the same with the rep/partner still being listed as the original client's partner.
- You can then refer the product to yourself by clicking on the Refer button, which you can access on the top right-hand corner of the Organisation tab.

REFERRAL PAGE

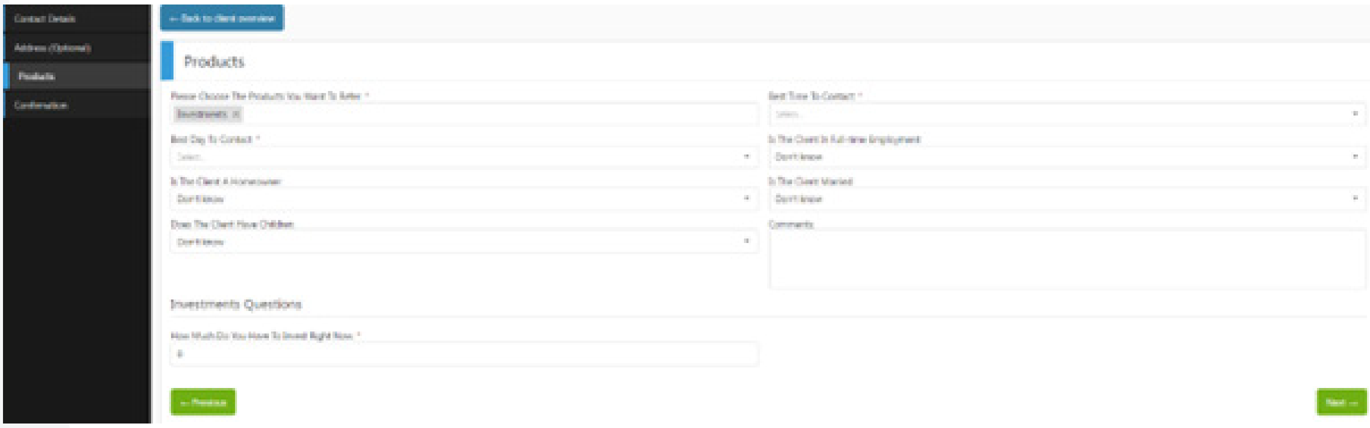
1. **Contact details:** Usually this section already is pre-populated from the client's account.



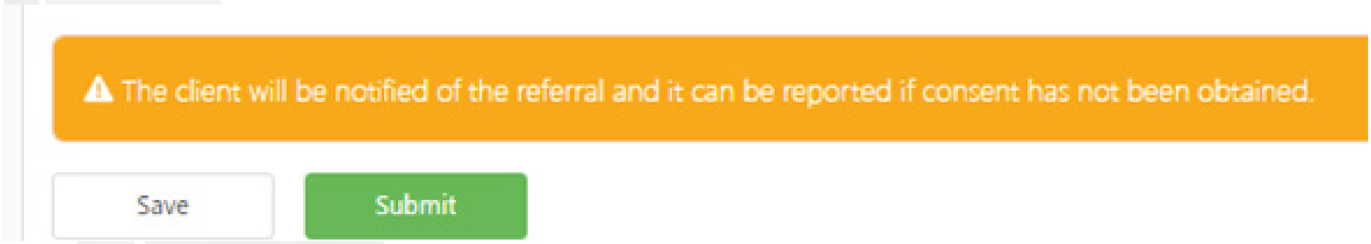
2. **Address (Optional):**



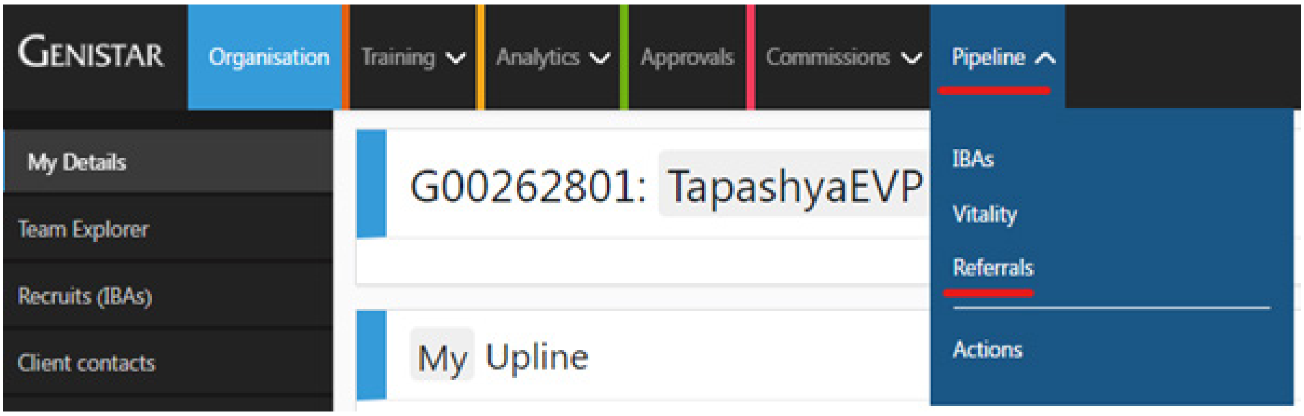
3. **Products:** Please select the product(s) that the client is being referred to. You can refer client's to more than one product at a time, simply select the products from the list available. There will be further questions that will appear accordingly.



4. **Confirmation:** Please review the summary of the referral and Click Save to save or Submit when you are ready to submit.



REFERRAL PIPELINE



POST REFERRAL

- After the client has been referred to MoneyFarm, they will receive an email with a link that will direct them to the MoneyFarm sign-up page.
- The client's details are pre-populated, so please make sure they continue with those details.
- Please note, sharing and forwarding the link can cause duplicate sign ups, so please inform the client not to do that.
- If the client would like to refer family and friends, they will need to be registered as a client on Genistar Online first, then only they can be referred.
- Example, please use this link to see pre-populated details.
- Watch this video.

ESCALATION PROCESS

Two types of enquiries with different engagement channels.

1. **Customer-related requests** (e.g., a request for clarifications on the service by a customer)

a. For this kind of request, the customer might get a solution directly from a Genistar sales rep or be relayed to MFM CRM via the official mail and phone contacts.

b. On the "G-CODE" exchange as a means of identifying the user on our side, we'll follow up on a dedicated thread.

2. **Escalation requests** (e.g., tech or non-tech issues impacting the service and not related to a single customer)

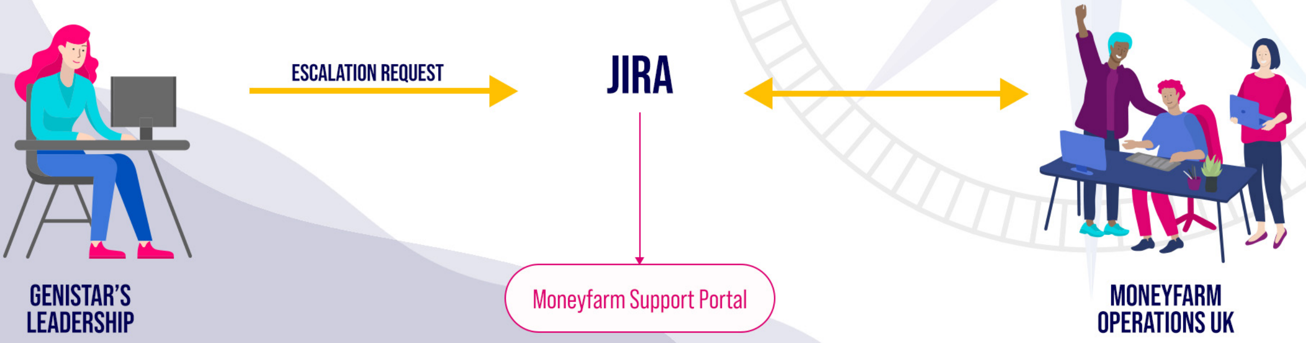
a. The Genistar FSC team issues a ticket in our Support system to start troubleshooting. This is still yet to be set up for FSC.

CLIENT REQUESTS

GENISTAR		MONEYFARM
CLIENTS	L1	L2
When clients encounter issues, they refer to FAQs, contact Genistar's Sales Reps, or contact Moneyfarm's Sales Reps.	In some cases, Genistar's Sales Reps can provide initial contact with a client and may recommend that they contact Moneyfarm.	Moneyfarm's Sales Reps provide initial contact with the clients or Genistar's Sales Reps and, if needed, escalate the request to Moneyfarm's internal teams.

ESCALATION REQUESTS

ESCALATIONS	MONEYFARM
GENISTAR'S LEADERSHIP	L1
Genistar's Leadership escalate issues logging it into our JIRA portal.	Moneyfarm Operations UK team support issues related to AS, CTV, Billing, inflows and similar. In case of technical issues, they will escalate to Moneyfarm's internal teams.



Further Information:

1. Not all customers are contacted by MoneyFarm when referred.
2. Below is the table showing the criteria for Money Farm's eligibility for outbound CRM.
3. Please note though that anyone can call up or book an appointment to speak to one of our consultants. But for capacity constraints we must limit our outbound activity.

PARAMETER	TIER 1	TIER 2	TIER 3	N/A
CRM Eligibility	Eligible	Eligible	Non-eligible	Non-eligible
Total Assets	> = 350,000	> = 40,000 and < 350,000	< 40,000	Non-available
Annual Income	Any	< 30,000	< 50,000	Non-available
OR				
Total Assets	Any	> = 40,000 and < 100,000		
Annual Income	> = 100,000	> = 30,000 and < 50,000		
OR				
Total Assets	> = 100,000	< 40,000		
Annual Income	> = 30,000	> = 50,000 and < 100,000		
OR				
Total Assets	> = 40,000			
Annual Income	> = 50,000			

USEFUL LINKS:

1. https://www.moneyfarm.com/uk/
2. Portfolio Performance - Investment Portfolio Example | Moneyfarm

moneyfarm

SMART TECH | TOP EXPERTS | SIMPLE INVESTING.

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Financial Freedom For All

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Authorised and Regulated by Financial Conduct Authority.