

How to self-register to use the Online Web Portal

To access our secure Online Web Portal and view your Magellan holdings online, complete the self-registration process:

1. Go to the Magellan website –www.magellangroup.com.au/ and click the orange 'Investor Login' button in the top right hand corner.
2. Go to the Apex Fund Services box and click 'Investor Login'.
3. Select 'Register'
4. Complete self-registration for online web portal access

You will need the following details handy to complete the registration process:

1. your Investor Number (Portfolio Number, HIN or SRN) which you can locate on your statements or welcome letter.
2. The Magellan fund name you are invested in.
3. Your contact details including your email address and mobile number.
4. *Part* of the registered name (for example, if the holding name is JOHN ALBERT SMITH, just enter 'SMITH' or 'SMI'),
5. Country as per your address on file.
6. Postcode of the registered holding (if in Australia)



Portfolio Numbers are 6 digits.
HIN's will commence with "X" followed by up to 11 digits.
SRNs will commence with "I" followed by 11 digits.

You will need to self-register for each Magellan investment you hold that has a different Account Name/Portfolio Number.

Once you complete the self-registration process, you will be able to:

- View your unit holdings.
- View your transactions online.
- Run customised reporting for different date ranges.
- Access your AMMA (tax) Statements, Periodic Statements, and Distribution Statements.
- Update your contact details* and correspondence elections.
- Update your distribution preferences.

For more assistance

If you require assistance, please call Apex Group on business days between 8:30am and 5:30pm (Sydney Time) on 1300 127 780 (in Australia), +61 2 8259 8566 (International) or 0800 787 621 (New Zealand)

*On Market/HIN investors can update phone and email addresses via the portal however address changes must be done through the registered broker.