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BELL POTTER APP

FREQUENTLY ASKED QUESTIONS (FAQ)

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- Who should I contact if I need help?
- Will video tutorials be available?

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FREQUENTLY ASKED QUESTIONS (FAQ)

This FAQ provides general information about the Bell Potter App, including access, security, accounts, portfolio information and available functionality. It also includes key migration information for clients moving from the classic Client Access experience.

For first-login instructions, refer to the separate Bell Potter App Set-Up Guide.

AT A GLANCE

- The App provides mobile access to Bell Potter investment information, including portfolio details, research and charting tools.
- You can continue using your existing Client Access login details. If your password does not meet the new security requirements, you may be prompted to create a stronger one.
- Multi-Factor Authentication (MFA) is being introduced to strengthen account security and can be set up using an authenticator app, email or SMS.
- **For support, contact your adviser / Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.**

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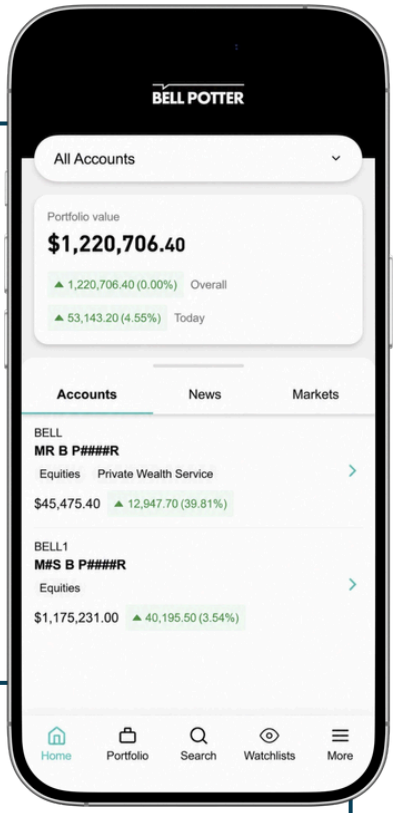
FREQUENTLY ASKED QUESTIONS (FAQ)

ABOUT THE BELL POTTER APP



What is the Bell Potter App?

The Bell Potter App provides a convenient way to access investment information from a mobile device. It brings together portfolio information, Australian and global market pricing, independent and Bell Potter research, market coverage and charting tools in one place.

Why is Bell Potter launching a mobile App?

Bell Potter is launching the App to provide a more modern and secure mobile experience for clients who use Client Access. It gives you convenient access to your investments on the go, with portfolio information, market data, research and enhanced security features available in one place.

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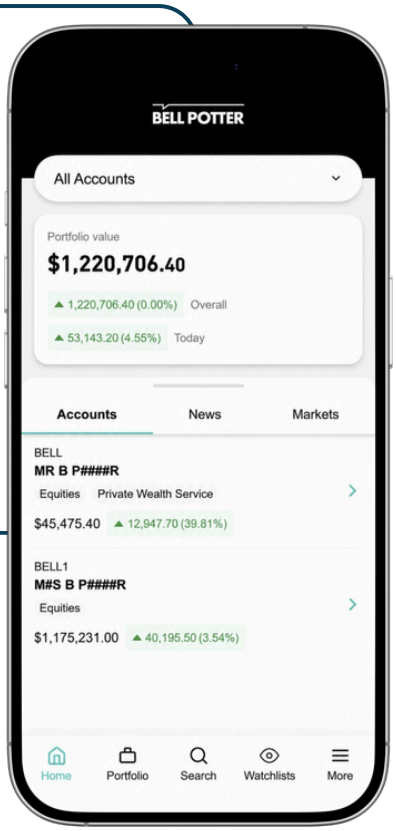
FREQUENTLY ASKED QUESTIONS (FAQ)

Who is LSEG?

LSEG, or London Stock Exchange Group, is a global financial markets infrastructure and data provider. Through LSEG, the Bell Potter App provides access to expanded market data, research and charting tools to help you stay informed.



Will the App replace my adviser?

No. The App is an additional way to access investment information. Your adviser relationship and service remain unchanged.

Will Client Access on desktop change?

There is a planned upgrade to our Client Access experience in the coming months. You will receive more information on those changes later in the year.

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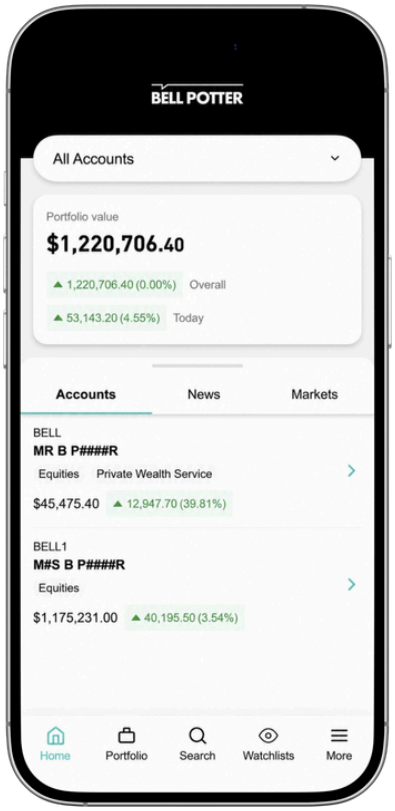
FREQUENTLY ASKED QUESTIONS (FAQ)

What are the main benefits of the Bell Potter App?



The App helps you:

- View your portfolio anytime, anywhere, including holdings, value and performance.
- Monitor Australian and global markets, including major indices.
- Track investment opportunities with personalised watchlists and market depth.
- Stay informed with ASX announcements, company news and market commentary.
- Access broader investment insights through Bell Potter and LSEG research, deeper US stock coverage, ETF screening tools and fund analysis.
- Log in simply and securely with Face ID, Fingerprint ID and Multi-Factor Authentication (MFA).
- Manage your Bell Potter account online with enhanced self-service tools.
- Navigate with ease through a cleaner, intuitive experience designed for investors on the move.

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FREQUENTLY ASKED QUESTIONS (FAQ)

ACCOUNTS AND ACCESS

Do I need a Client Access account?

Yes. A Client Access account is required before logging in to the App. You must be a Bell Potter client to create a Client Access account. If you are new to Client Access, you can register here.

Will I need new login details?

No. Existing Client Access login details will be migrated as-is and can continue to be used if known. You should make sure you can access the email address used as your username, as it is needed for email MFA and password resets. If a password needs to be reset, it must meet the new password requirements.

Can I use the App on more than one device?

Yes. You can use the App on multiple devices, provided you have your login credentials and MFA set up.

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FREQUENTLY ASKED QUESTIONS (FAQ)

Will I need to complete MFA on every device?

Yes. You only need to register for MFA once, but you will need to use MFA when logging in on each device.

Will I see all my Bell Potter accounts?

The expected minimum operating-system versions are iOS 16 for Apple devices and Android 7 for Android devices.

Can joint or company account holders use the App?

Yes. Joint account holders can access the App using their own credentials. The same applies to company account holders.

Which devices are supported?

The expected minimum operating-system versions are iOS 16 for Apple devices and Android 7 for Android devices.

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FREQUENTLY ASKED QUESTIONS (FAQ)

Where can I safely download the Bell Potter App?

Download the Bell Potter App using the buttons below, which link to the Apple App Store and Google Play Store. You can also search for "Bell Potter" directly in either store.

Download on the App Store

GET IT ON Google Play

For security, check that the app name is correct and that the listing is for the official Bell Potter App before downloading.

Bell Potter will never ask you to install the App from a link sent by SMS, email or social media, install an app from outside the official app stores, or provide your password, PIN or MFA code by phone or message.



***App store and Google Play links will be available soon. Please check back later.**

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FREQUENTLY ASKED QUESTIONS (FAQ)

SECURITY AND MFA

What is Multi-Factor Authentication (MFA), and why is it required?

MFA adds an extra verification step beyond your password to help keep your account secure and reduce the risk of unauthorised access.



What MFA methods are available?

You can choose an authenticator app, email one-time code or SMS one-time code during first login.

OTP One-time password or one-time passcode. It is a code used once to verify your identity.

TOTP Time-based one-time password. It is a time-limited code generated by an authenticator app.

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FREQUENTLY ASKED QUESTIONS (FAQ)

Can I change my MFA method?

MFA methods cannot currently be changed through self-service. If you need to update your phone number in Client Access or reset your MFA method, contact your adviser, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.

I have forgotten my password



Select the password reset option and follow the prompts. You will need access to the email address you normally use to log in to Client Access. If you cannot access this email address, contact your adviser, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.

What are the password requirements?

A new or reset password must contain at least 12 characters, including at least one uppercase letter, one lowercase letter, one number and one special character.

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FREQUENTLY ASKED QUESTIONS (FAQ)

Why do I need to create a stronger password?

If your current password does not meet the new security requirements, you may be prompted to create a stronger password.

Your new password cannot be the same as the password used on the legacy site.

A new password must include:

- At least 12 characters
- At least one number
- At least one lowercase letter
- At least one uppercase letter
- At least one special character



My email verification code has not arrived

Check your junk or spam folder and confirm you are using the correct login email. If another enrolled MFA method is available, select it. If you still need help, contact your adviser, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.

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FREQUENTLY ASKED QUESTIONS (FAQ)

My SMS verification code has not arrived

If your SMS code does not arrive, it may have been sent to a different mobile number.

If another enrolled MFA method is available, select it. If you need to update your phone number in Client Access or reset your MFA method, contact your adviser, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.



I have lost or replaced my phone

If you have lost or replaced your phone, you will need to reset your MFA method on your new device. Contact your adviser, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.

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FREQUENTLY ASKED QUESTIONS (FAQ)

I need to change my MFA method

MFA methods cannot currently be changed through self-service. To change your MFA method, contact your adviser, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.

Can I use Face ID or Fingerprint ID?

Yes. Face ID and Fingerprint ID are available for secure login once you have completed MFA set-up on your device.



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FREQUENTLY ASKED QUESTIONS (FAQ)

PORTFOLIO INFORMATION AND FUNCTIONALITY

Will my portfolio information be available?

Yes. Account data and available history will remain visible in the App. The Client Access website will continue to provide more detailed holdings information, including report downloads.

What historical information will be available?

The App includes your investment information from 2020 onwards.

How current is the portfolio information?

Australian and US market pricing is live. Other global markets show end-of-day pricing, based on the previous trading day's closing price.

Will my watchlists be available?

Yes. Existing watchlists will be available in the App.

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FREQUENTLY ASKED QUESTIONS (FAQ)

Will reports be available in the App?

Reports are not included in the initial App release but are planned for a future release. In the meantime, reports remain available on the Client Access website.

Can I download or share reports?

Report download and sharing are not available in the initial App release, but are planned for a future release. In the meantime, you can continue to download and share reports from the Client Access website.

Will all Client Access functions be available in the App?

No. Some functions available through Client Access will not be included in the initial App release. Additional functionality may be introduced over time.

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FREQUENTLY ASKED QUESTIONS (FAQ)

Will Private Wealth Service clients be able to use the new experience?

Yes. Private Wealth Service clients will be able to view their portfolios. Reports are not included in the initial App release but are planned for a future release. In the meantime, reports remain available on the Client Access website.

Will the App log me out after inactivity?

The App does have inactivity timeout for your security. If you are logged out due to inactivity, you will need to log back in.

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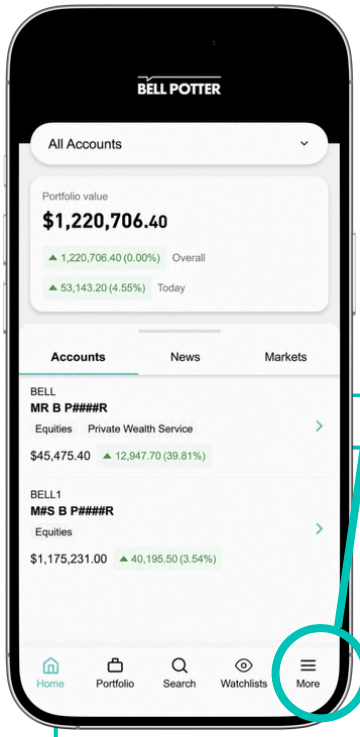
FREQUENTLY ASKED QUESTIONS (FAQ)

FINDING INFORMATION IN THE 'MORE' MENU



Where can I find the More menu?

The More menu is available from the bottom-right corner of the App. Tap More to access additional areas including Research, Derivatives, Superannuation, My Profile and Sign out.

Where can I view my profile details?

Tap More, then My Profile. From there, you can view areas such as My details, My accounts, Your Advice Team and Forms & documents.

Where can I find my adviser or advice team details?

Tap More, then My Profile, then Your Advice Team. This is where you can find details for your Bell Potter adviser or advice team.

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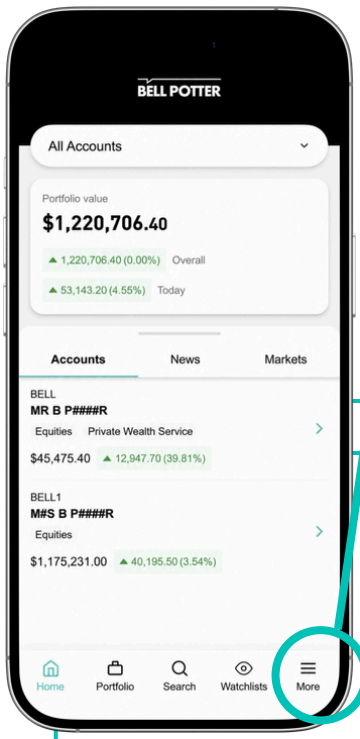

Where can I find forms and documents?

Tap More, then My Profile, then Forms & documents. This will take you to the relevant Bell Potter forms and documents available online.

How do I sign out of the App?

Tap More, then Sign out. You may need to sign in again before accessing your account information.

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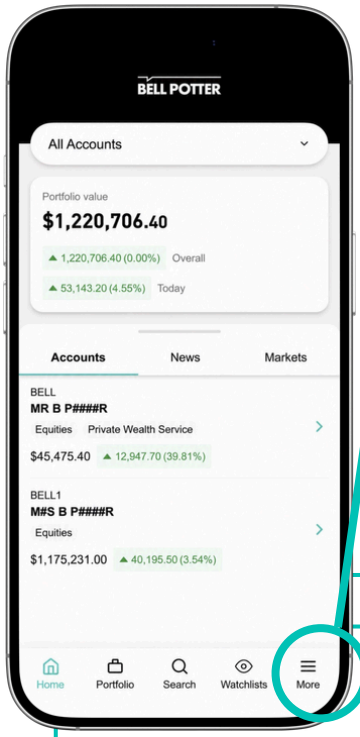
FREQUENTLY ASKED QUESTIONS (FAQ)



Where can I find Help and legal information?

Tap More, then My Profile, then Help and legal. This section includes Help and support, where you can find Support details and Frequently asked questions, as well as Legal information such as Terms and conditions, Financial services guide, Complaint resolution, Privacy policy, Disclosure of interests and Contact us.

Where can I get technical support?

Tap More, then My Profile, then Help and legal, then Support details to access technical support information. For app and platform support, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514. If you need advice or account-specific support, contact your adviser or tap View my advisory team.

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FREQUENTLY ASKED QUESTIONS (FAQ)

HELP AND SUPPORT

Where can I find set-up instructions?

Refer to the Bell Potter App Set-Up Guide (include link) for registration, password, download, first-login and MFA instructions.

Who should I contact if I need help?

For help with registration, login, password reset, MFA or account access, contact your adviser, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.

Will video tutorials be available?

Yes. Supporting resources, including app download, MFA, set-up and first-login video tutorials, will be available here: www.bellpotter.com.au/app