BELL POTTER
IT'S PERSONAL

BELL POTTER APP
SET-UP GUIDE

Use this guide to register for Client Access, prepare your login details, download the Bell Potter App and complete your first login securely.

Once your registration is complete and your account is active, continue with the steps below.

NEW TO CLIENT ACCESS?
FIRST-TIME USER CHECKLIST

- Register for Client Access if you are a new user.
- Know the email address you normally use to log in to Client Access.
- Check that you can enter your password manually.
- Confirm that you can access your login email.
- Choose your second form of identity verification for Multi-Factor Authentication (MFA): SMS, email or an Authenticator App.
- If using SMS as your second form of verification, check that your mobile number registered with Bell Potter is current.
- Install an Authenticator App if using this option.
- Make sure you know your Apple App Store or Google Play Store login details so you can download the App.
- Download the App from an official app store link.
- Select and complete your preferred MFA method during first login.

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BEFORE YOU BEGIN

1

Check your login details

Manually enter the email address and password you normally use to log in to the Bell Potter Client Access website. Passwords saved in your browser cannot be migrated to the App, so you will need to enter your password when you first log in to the App.

2

Check that you can access your email

You may need your login email to receive an email verification code or reset your password. If you don't have access to this email, contact your adviser or email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.

3

Check your mobile number

If you plan to use SMS for verification, make sure the mobile number registered with Bell Potter is current and correctly formatted. International numbers must include the country code, for example +6427036422 for a New Zealand mobile.

4

Install an Authenticator App, if preferred

Common options include Apple Passwords, Microsoft Authenticator, Google Authenticator, and 1Password.

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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.

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

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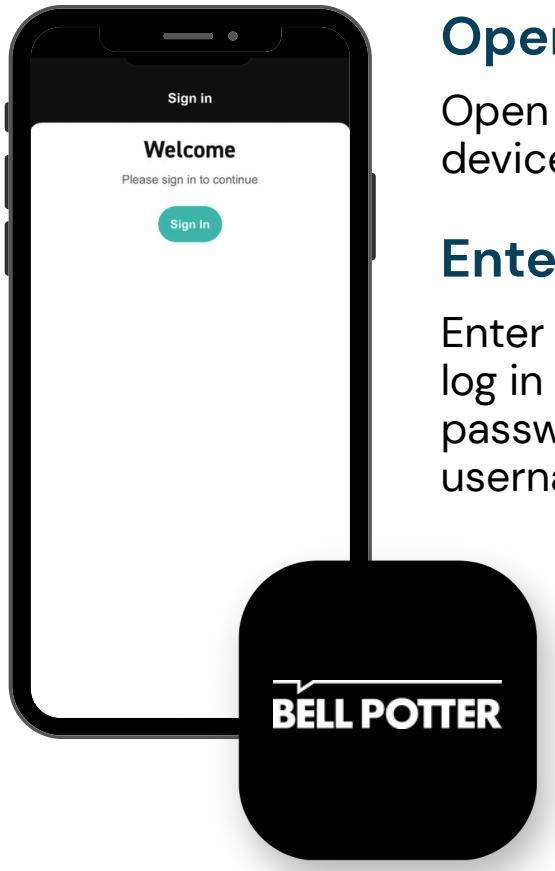
LOG IN FOR THE FIRST TIME

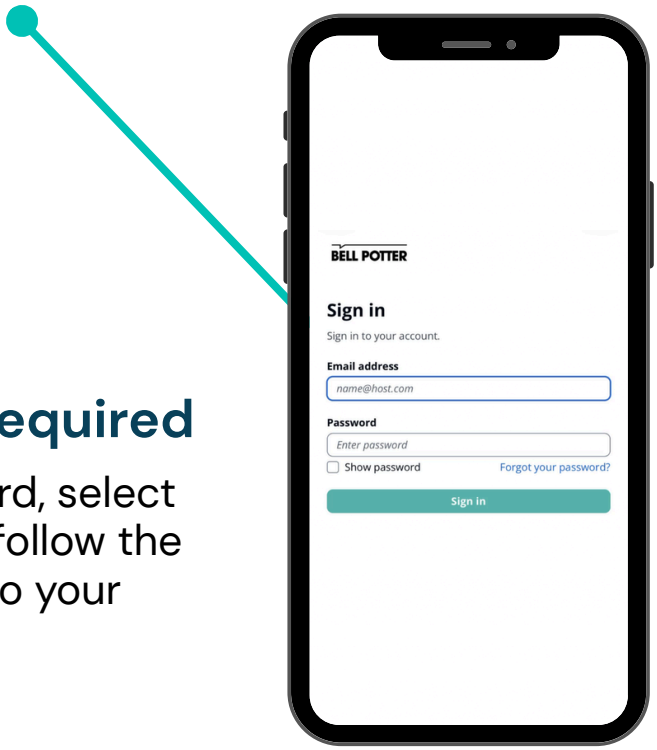


Open the App

Open the Bell Potter App on your mobile device.

Enter your existing details

Enter the email address you normally use to log in to Client Access and your existing password. You do not need a separate username or password for the App.



Reset your password if required

If you do not know your password, select the password reset option and follow the prompts. You will need access to your login email.

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PASSWORD REQUIREMENTS

A new or reset password must contain:

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

These stronger requirements improve account security and make passwords harder to guess or compromise.

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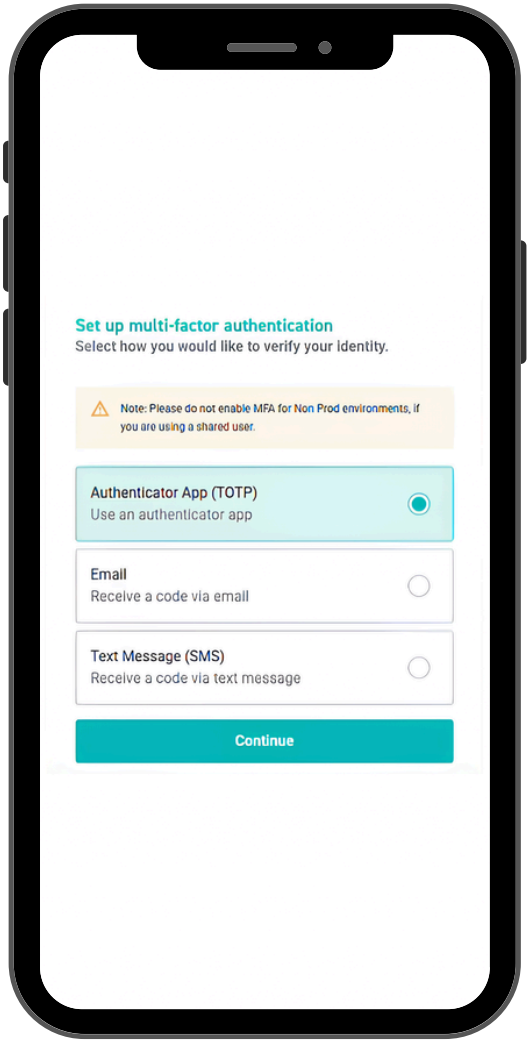
SET UP MULTI-FACTOR AUTHENTICATION

The first time you log in, the App will ask how you would like to verify your identity.



Choose your verification method:

Authenticator App (TOTP)

- Select this option to use a time-limited code generated by Authenticator App. Common options include Apple Passwords, Microsoft Authenticator, Google Authenticator and 1Password.

Email

- Select this option to receive a verification code at the email address associated with your Client Access login.

Text Message (SMS)

- Select this option to receive a verification code at the mobile number held on your account.

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SET UP MULTI-FACTOR AUTHENTICATION

Once you have selected your preferred option:

1. Select Continue and follow the on-screen instructions.
2. Enter the verification code when prompted.
3. Once verified, you can access the App.

What is MFA?

MFA stands for multi-factor authentication. It adds an extra verification step beyond your password to keep your account secure.

What is OTP?

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

What is TOTP?

TOTP stands for a time-based one-time password. It is a time-limited code generated by an Authenticator App.

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COMMON LOG IN QUESTIONS

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.

My email verification code has not arrived

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

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 advise, email Bell Potter Client Support at clientsupport@bellpotter.com.au or call 1300 373 514.

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COMMON LOG IN QUESTIONS

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.

I need to change my MFA method

MFA methods cannot currently be changed through self-service. 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, both Face ID and Fingerprint ID are available for secure login.

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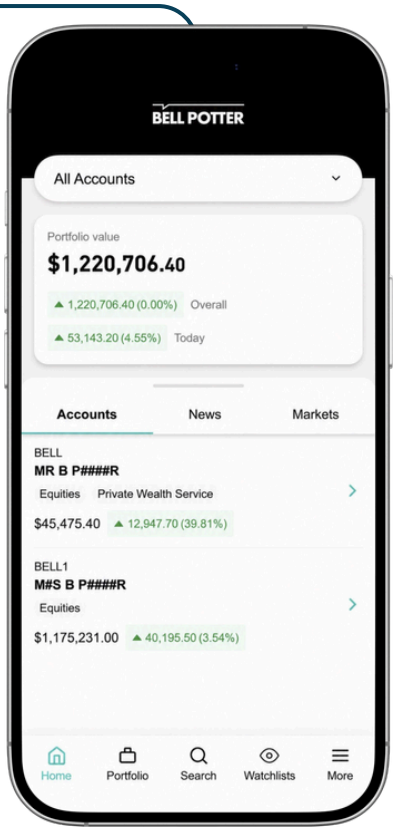
After you log in

You can begin exploring your investment accounts, portfolio holdings, pricing, research, charting tools and other functionality in the App. Some features, including reports and report sharing, may not be available in the initial release.



Client Access on desktop

The App is an additional way to access your investment information. There will be no changes to the existing Client Access website as part of the initial App launch. Client Access changes are planned for a later phase and will be communicated separately.

Need help?

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