

PORTAL NAVIGATION GUIDE

PHILANTHROPY AT YOUR FINGERTIPS. ANY TIME. ANY PLACE.

MY DETAILS AND ACCOUNT INFORMATION

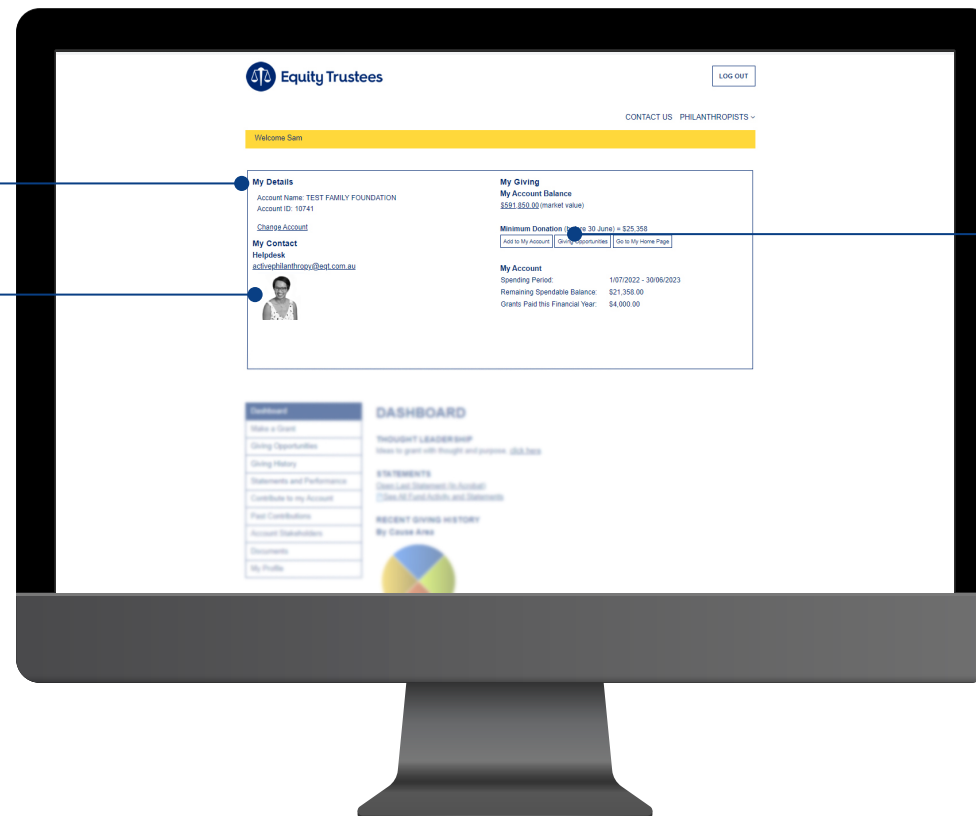
Every page in the portal will always have your account information and details at the top.

MY DETAILS

Here you will find the details your login is associated with.

YOUR CONTACT

This is your contact person who you can access for any questions related to your account. Your contact can assist you with functions on the Equity Trustees Philanthropy portal or with your philanthropy more generally.



SPENDING CALCULATION

Here you can see your account's market value and spendable balance if applicable. Your balances are updated in real time as transactions are processed and investment valuations are updated.

GOOD TO KNOW

Market Value: The total balance of your account, which is invested and subject to investment market movements.

Spendable Balance: The amount that must be donated to charity/s each financial year.