Computershare

BARONSMEAD PORTAL

QUICK REFERENCE GUIDE

This booklet is designed to provide a short overview of the Atribo Baronsmead Portal. The Atribo Baronsmead Portal is a technological innovation developed by Computershare Limited in partnership with The Reach Agency, a leading digital development firm specializing in business process improvements.

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REACH atribo

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WHAT IS THE PORTAL?

Baronsmead are offering IFAs access to a Management Portal to engage with their clients and track applications through to payment.

IFAs can view real-time application data and analytic dashboards; drill-down into specific investor applications; and see expected aggregate commissions.

Go to www.baronsmeadportal.co.uk

NEED HELP?

Computershare Investor Services

Email: baronsmeadOFS@computershare.co.uk

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ACCESSING THE SYSTEM

SET UP A USER ACCOUNT

Select “Request Access”, complete the form, and submit it. Please note that the request must be made for a named individual rather than a generic account.

You will receive an email from the Management Portal, providing a link that allows you to set up your password. You can then log in and begin using the system.

I DON’T KNOW OR FORGOT MY PASSWORD

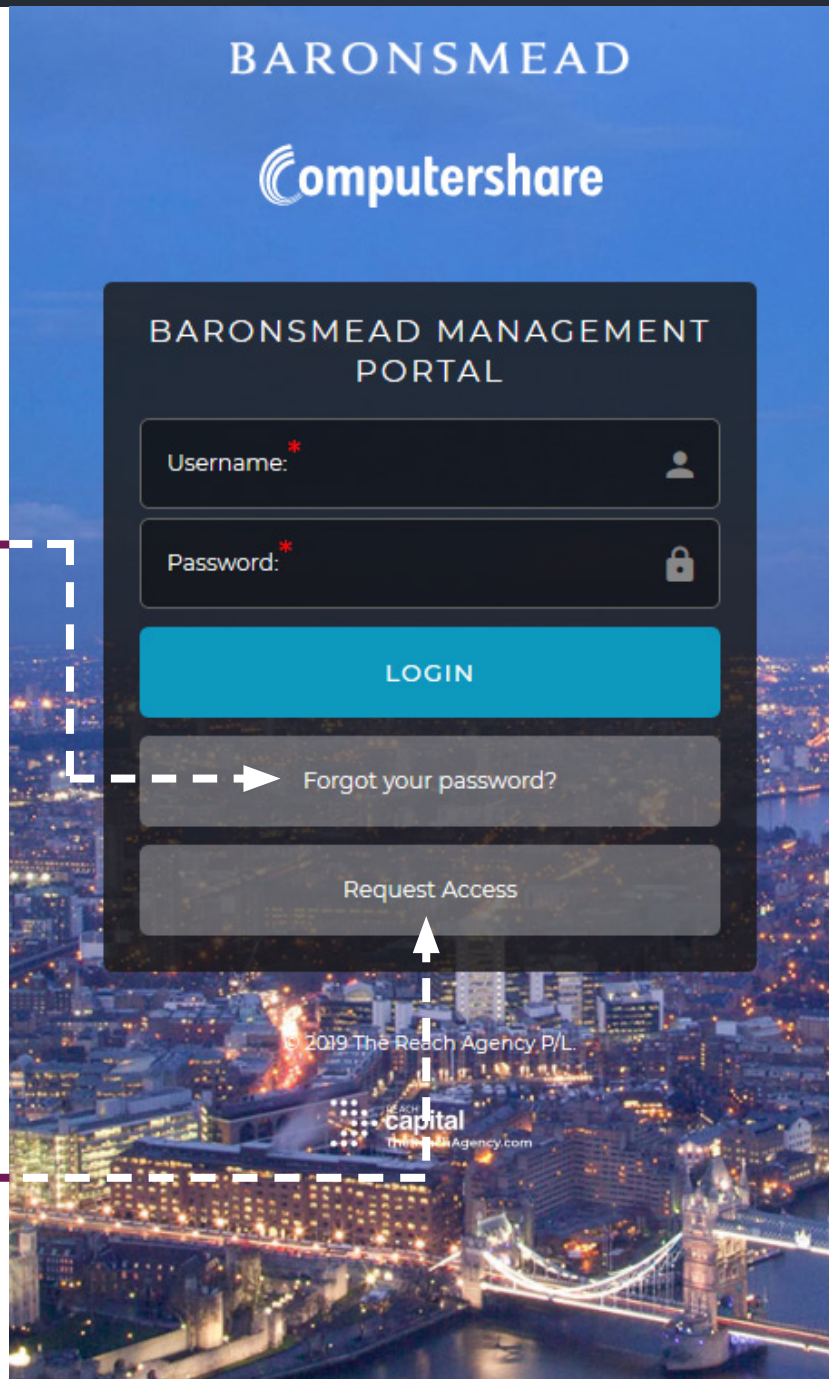
Enter your email address and click the ‘Forgot your password?’ button.

You will receive an email that allows you to set a new password.

If you do not receive this email:

⚠ Check your spam folders and email deletion rules.

If you are still unable to locate the email, please contact the Computer-share support team and provide them with your email address.



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HOW THE CLIENT ENGAGEMENT PROCESS WORKS FOR IFAS

1 PROVIDE YOUR PROFILE DETAILS

Note: You only need to do this once.

Step One: Log into the Management Portal.

Step Two: Access the 'IFA Profile' page to provide the 'Adviser and Firm Details' that will be displayed on the investor's application form.

Provide your preferred 'Payment Details' for Baronsmead to pay you for your investor's applications.

2 OBTAINING THE UNIQUE LINK FOR YOUR INVESTORS

Step One: Access the 'Client Engagement' page and generate unique links to the investor's application form.

You can determine specific fees for individual investors, and generate links individually or in bulk.

Step Two: Provide these links to investors via your own email service provider.

3 INVESTOR SUBMISSIONS

Each investor uses their unique link to access an application form. This blank form includes your 'IFA Profile' details and the fees you set when generating the unique link.

Investors complete the form and submit it to the registry.

4 REGISTRY REVIEW

The registry will review the submissions and will manage their payment status.

You will be able to see the status of the submissions as they are transitioned through the workflow.

4 OCTOBER
PHASE 1

- Management Portal access
- Client Engagement
- IFA Details

16 OCTOBER
PHASE 2

- Dashboard
- Application List and Details
- Application Workflow

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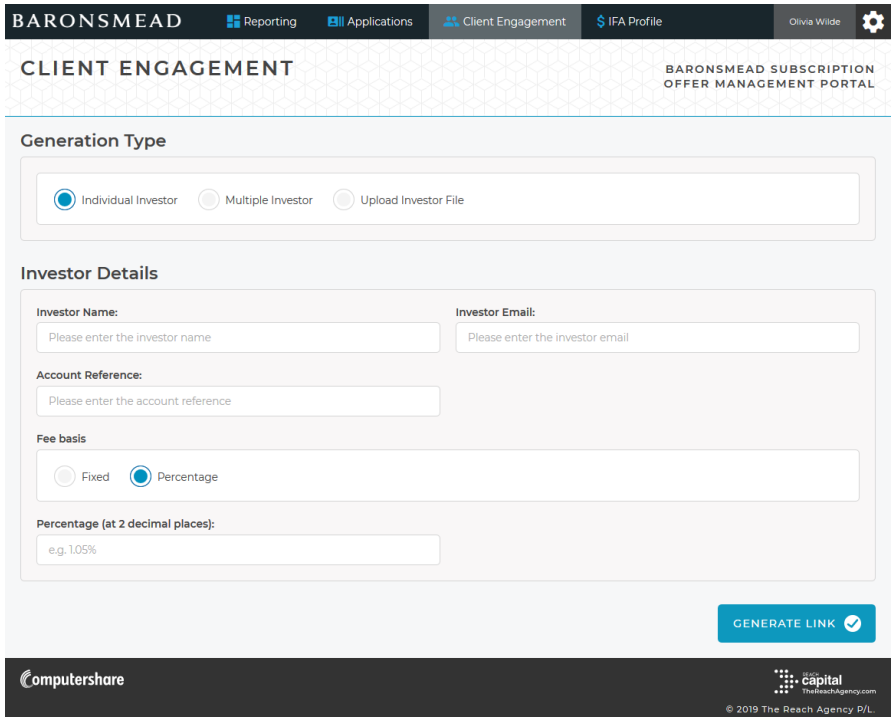
CLIENT ENGAGEMENT

1 INDIVIDUAL INVESTOR

Generate a unique link to send to an individual investor using the 'Individual Investor' option.

You can determine a specific fee. When the investor uses your link to access the application form, your 'IFA Profile' details and fee will be automatically populated.



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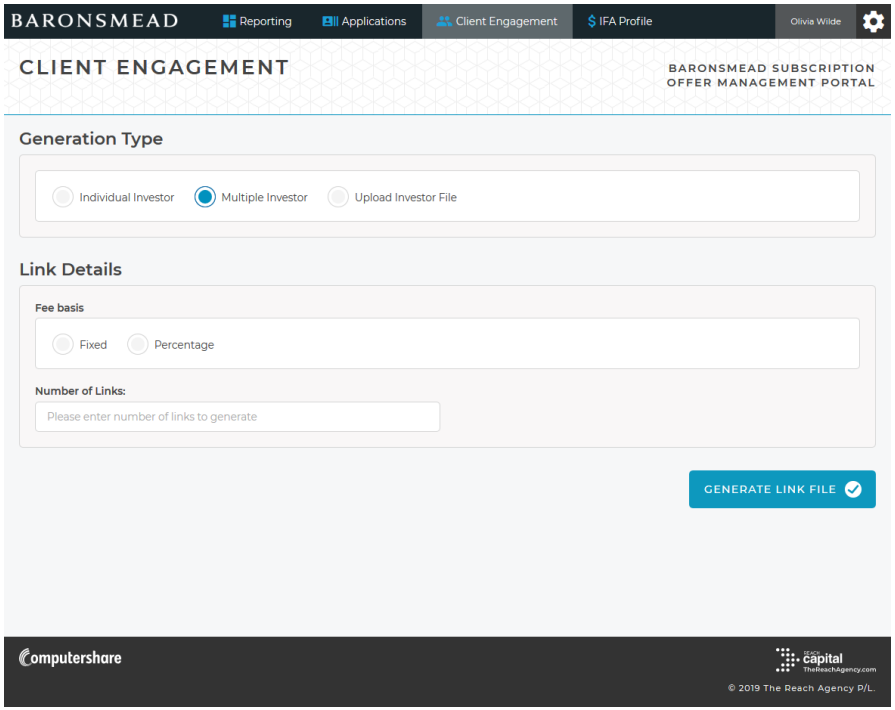
CLIENT ENGAGEMENT

2 MULTIPLE INVESTORS

Generate several unique links to send to multiple investors at once using the 'Multiple Investor' option.

You can determine a fee and download a file containing multiple links. Provide these links to investors via your own email service provider.

When investors use your links to access the application form, your 'IFA Profile' details and fee will be automatically populated.



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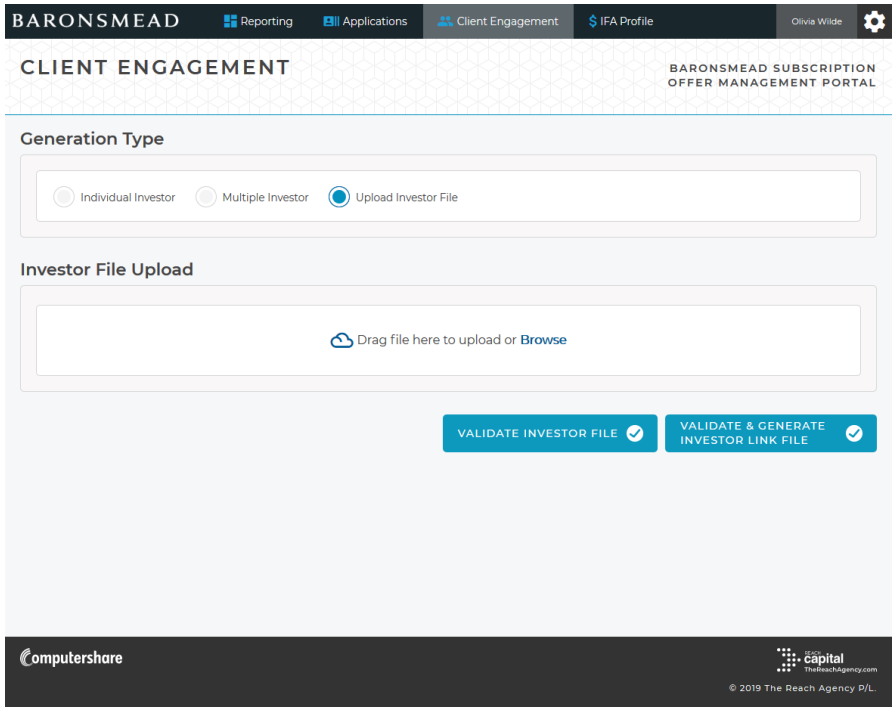
CLIENT ENGAGEMENT

3 UPLOAD INVESTOR FILE

Generate personalized unique links to send to investors using the 'Upload Investor File' option.

You can determine investor-specific fees and account references and download a file containing a link for each investor uploaded. Provide these links to investors via your own email service provider.

When investors use your links to access the application form, your 'IFA Profile' details and fees will be automatically populated.



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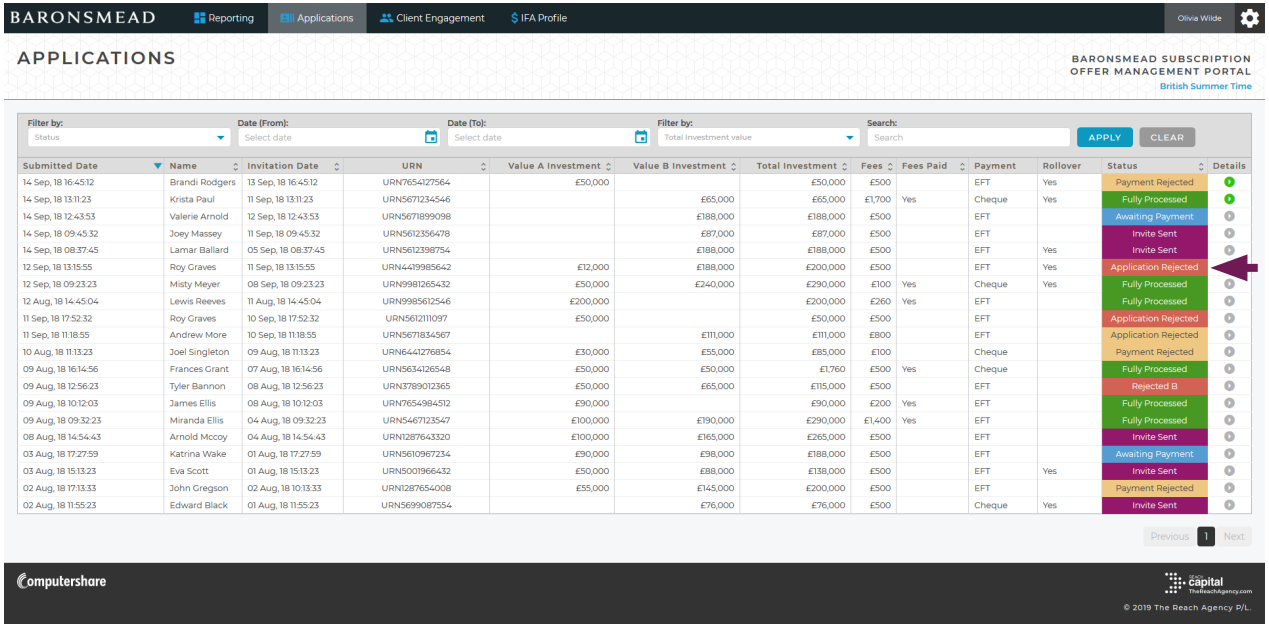
APPLICATIONS



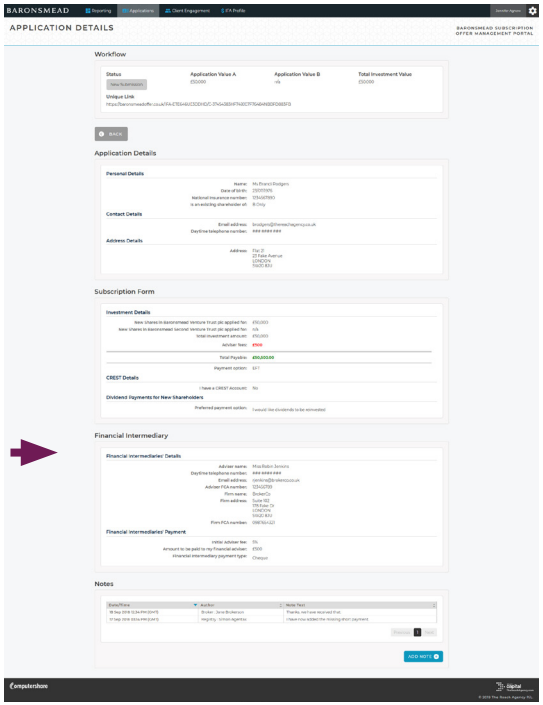
APPLICATIONS LIST VIEW

The complete list of submitted applications inclusive of key information.

Includes colour-coded statuses and filtering for straightforward progress review.

APPLICATIONS DETAILS VIEW

All details for a submitted application, inclusive of its current workflow status, application, subscription and financial details.



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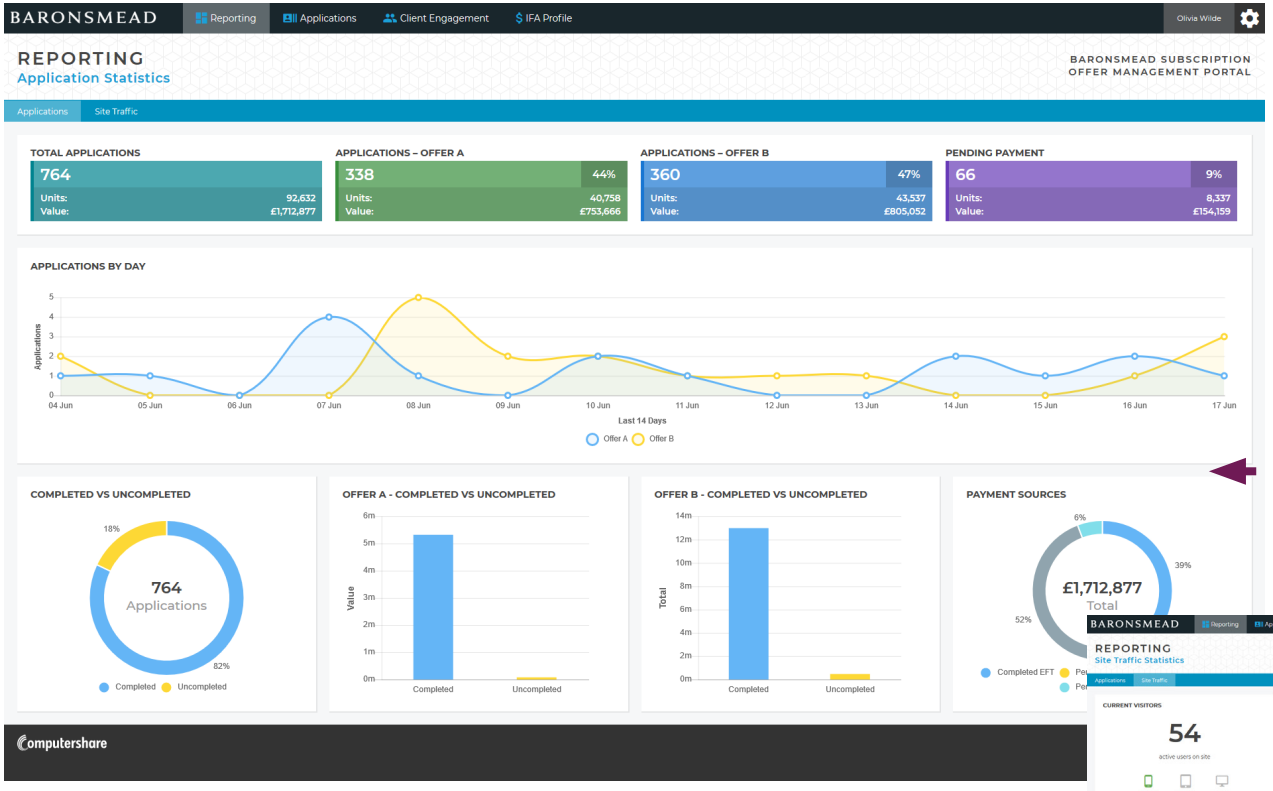
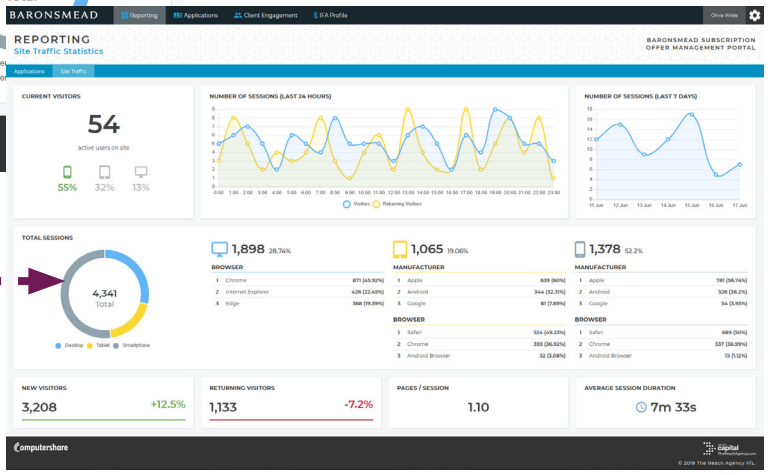
DASHBOARD



DASHBOARD STATISTICS

Real-time reporting on the applications submitted, their value and progress throughout the offer.



DASHBOARD SITE TRAFFIC

Live stats on visitors, sessions, hourly traffic, device and browser breakdown.

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