

# Help for Investors Using ShareReg Web Based Share Portal

## Registration

### Navigating to the Registration Page

- To register to use our Web Based Share Portal please click the Register link in the Account Log in section at the left side of our homepage (Figure 1). Then you can follow the 3 steps below to register.

**Account Log in**

Register with us and manage your shares online!

[Register](#) | [Help](#) | [Login](#)

## Welcome

Share Registrars Limited is a CREST registrar – in 2004 we were the first new entrant into this market for a number of years. Share Registrars was established to provide a professional and personal service to clients, advisors, brokers and shareholders.

Maintenance of the share register

Figure 1 – Share Registrars Website Homepage

### Step 1 - Select the company you have shares with (Figure 2)

**Account Log in**

Register with us and manage your shares online!

[Register](#) | [Help](#) | [Login](#)

## Signup with Share Registrars

**Register in 3 simple steps..**

Registering your portfolio is quick and easy. Once complete, an activation code will be sent to you in the post allowing you to activate and login to your account.

**What you will need to sign-up:**

- Your Investor ID as shown on a recent Share Certificate / Dividend Tax Voucher issued by Share Registrars.
- Hold shares in a Share Registrars company that is 'web enabled'.  
Note: You can check if the company is 'web enabled' with Share Registrars [here](#).

**Step 1 - Identify your account**

**Step 2 - Setup your online details**

Step 3 - Activate

**Step 1 - Select the company you have shares with**

You will need your investor ID and the name of at least one of your holdings.

Are you an:  Private Investor  Corporate Investor

Investor ID:

Company Name:

First Name(s) / Company Name:

Last Name:

Your UK Post Code:

I do not have a UK post code:

[Next](#)

Figure 2 – Select the company you have shares with

- You are required to provide the following information in this step:
- Private Investor/Corporate Investor** – Please select whether you are a private investor or a corporate investor.

- **Investor ID** - You can find it on a recent share certificate/dividend tax voucher issued by Share Registrars. It may be called 'Holder No.' in some share certificates/dividend tax vouchers. If your latest share certificate/dividend tax voucher was issued by a different Registrar, please contact us and we can help you with the registration.
- **Company Name** - Please click the drop down list to select the name of our client company with whom you hold your shares. If the company you are looking for is not on the list, it may be that the client company has chosen not to offer its shareholders the services provided by the Share Portal. In that case, you can not register.
- **First Name(s)/Company Name** - If you are a private investor, this is your first name and middle name (if any), as shown on the share certificate/dividend tax voucher. If you are a corporate investor this is your full company name.
- **Last Name** This is your last name as shown on the share certificate/dividend tax voucher if you are a private individual. A corporate investor should leave this field blank.
- **Your UK Post Code** - Please provide your post code if your registered address for your holding is in the UK, otherwise please tick the 'I do not have a UK post code' flag to indicate that you do not have a UK post code.

## Step 2 - Setup your online account (Figure 3)

**Account Log in**

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Register with us and manage your shares online!

[Register](#) | [Help](#) | [Login](#)

### Signup with Share Registrars

**Step 2 - Setup your online account**

Pick a user name and choose a password, you will need this each time you log in so please make it memorable

Registering your portfolio is quick and easy. Once complete, an activation code will be sent to you in the post allowing you to activate and login to your account.

**What you will need to sign-up:**

- Your Investor ID as shown on a recent Share Certificate / Dividend Tax Voucher issued by Share Registrars.
- Hold shares in a Share Registrars company that is 'web enabled'.  
Note: You can check if the company is 'web enabled' with Share Registrars [here](#).

[Step 1 - Identify your account](#)  
[Step 2 - Setup your online details](#)  
[Step 3 - Activate](#)

User Name:

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Password:  Minimum 8 characters with at least 1 capital letter & 1 numeric digit

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Confirm Password:

---

E-mail:

---

Retype E-mail:

---

Date of Birth:

---

Security Question 1: Please select question...

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Answer to Security Question 1:

---

Security Question 2: Please select question...

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Answer to Security Question 2:

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Security Question 3: Please select question...

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Answer to Security Question 3:

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Legal Terms Accepted:

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**Please note:**

You will need to remember the answer to your security question exactly in order to retrieve your password if forgotten

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Note: By registering you are agreeing to receive email communications from Share Registrars in connection with your Share Holding(s).

[Create Account](#)

**Figure 3 – Setup your online account**

- **User Name** - Please create a user name. No space is allowed in the user name.
- **Password** - Your password should have at least 8 characters, including at least 1 capital letter and 1 numeric digit.
- **Email** - Please enter an email address for receiving information about your registration.
- **Date of Birth** - Please enter your date of birth. This is for security purpose only in case that you forget your user name or password.
- **Security Questions and Answers** - Please select 3 security questions and remember the answers that you provide. These will help you retrieve your user name or password if necessary.
- **Legal Terms Accepted** – To View the Legal Terms please click the Legal link at the bottom of the page. Please tick this flag if you fully understand and accept the legal terms for registering at our website and using the Share Portal.
- Then you can click the **Create Account** button to complete the registration.
- Once the registration is complete, a confirmation message is displayed on the screen and a web activation code will be posted to your registered address within seven days.

### Step 3 – Activation

- Once you receive your web activation code, you can activate your registration at the Share Portal. To do so please click the Login button in the Account Login section (Figure 1) and go to the Login page (Figure 4). On this page please enter your user name and password.

**Figure 4 –Log in**

- At the next page (Figure 5) you are required to enter the web activation code. After the code is entered and verified a confirmation message is displayed on the screen.

**Figure 5 –Activate your new account**

- The login page then appears automatically, where you can enter your user name and password again to log in.
- After that, the Share Portal View Portfolio page is displayed on the screen.

## Use the Share Portal

### Navigating the Share Portal

- The Share Portal screen has a navigation pane at the left and a details section at the right (Figure 6). By clicking different menu items in the navigation pane, you can navigate to different pages to access the services that the Share Portal provides, which are explained below.

**My Portfolio**

Welcome Testinvestor

[Help](#) | [Logout](#)

- ▼ My Portfolio
  - ▶ My Holdings
  - ▶ Add Holdings
  - ▶ My Dividends
  - ▶ My Meeting Votes
  - ▶ Contact Us
- ▼ Account Management
  - ▶ Personal Details
  - ▶ Change Details
  - ▶ Change Bank Details
  - ▶ Change Password
  - ▶ Logout

Share Registrar Portal > Portfolio

## View Portfolio

[Print this page](#)

**Welcome to the Share Registrars online shareholder service.**

Listed below are the Share Registrars managed clients you currently hold shares in.

Accounts:

### My Holdings

Investor ID	Company	Security	Total Holding
[REDACTED]	Testclient plc	01 - Test Ordinary Shares of 1p each	30000

⏪ Page  of 1 ▶ ⏩
Results per page:

[Add Holding](#)

**Figure 6 – View Portfolio**

### View Portfolio (Figure 6)

- This page is the default page when you log in. You can always return to this page by clicking the “My Holdings” menu item in the navigation pane.
- If you have just registered, the holdings you hold under the investor ID that you use for registration are displayed.
- You can go to the Add Holdings page to add other holdings (if any) by clicking the Add Holding button on the page.

### Add Holdings (Figure 7)

**My Portfolio**

Welcome Testinvestor

[Help](#) | [Logout](#)

- ▼ My Portfolio
  - ▶ My Holdings
  - ▶ Add Holdings
  - ▶ My Dividends
  - ▶ My Meeting Votes
  - ▶ Contact Us
- ▼ Account Management
  - ▶ Personal Details
  - ▶ Change Details
  - ▶ Change Bank Details
  - ▶ Change Password
  - ▶ Logout

Share Registrar Portal > Add Holding

## Add Holdings

[Print this page](#)

**What do I need to do next?:**

You can add more holdings to your Portfolio using the form below.

Simply enter the Investor ID as shown on a recent Share Certificate / Dividend Tax Voucher and select the company from the list.

**Please note:** The holdings registered address details on our system must match. If you can not see all your holdings maintained by us or have any other problems registering your new holdings please contact us [here](#).

Company Name:

Investor ID:

First Name(s) / Company Name:

Last Name:

Postcode:

[Add Holding](#)

**Figure 7 – Add Holdings**

- Your first name and last name (if you are a private individual) or company name (if you are a corporate body) and post code details are displayed automatically when you open up this page. If the name and post code of the holdings to be added are different from those displayed on screen please contact us to have the details amended before you can proceed to add the holding.
- If you are sure the details do match please select the company name of your holding and enter the investor ID for your holding.
- After that please click the Add Holdings button on the page. A message will be displayed on the screen confirming the addition is successful.

## My Dividends (Figure 8)

Share Registrar Portal > Dividends

Mr Test Investor's Dividends Print this page

Welcome Testinvestor Help Logout

**My Portfolio**

- My Portfolio
  - My Holdings
  - Add Holdings
  - My Dividends
  - My Meeting Votes
  - Contact Us
- Account Management
  - Personal Details
  - Change Details
  - Change Bank Details
  - Change Password
  - Logout

**Your Dividends**

Please use the drop down menu to select the account you would like to view dividends for.

Accounts:

---

**2 Dividends**

Investor Account ID	Record Date	Holding on Record Date	Payment Date	Payment Type	Cash Paid (£)	Scrip Shares Issued
[REDACTED]	28/03/2013	20000	08/05/2013	Cheque	2000.00	
[REDACTED]	28/03/2014	30000	08/05/2014	Cheque	3000.00	

Page 1 of 1 Results per page: 8

**Figure 8 – My Dividends**

- On this page, all of your dividends are listed. The latest dividends are displayed first.
- By default, all your dividends are displayed. You can select dividends paid to a specific investor account ID by selecting that investor account ID at the Accounts dropdown menu.

## My Meeting Votes (Figure 9)

Share Registrar Portal > Meeting Votes

Mr Test Investor's Meeting Votes Print this page

Welcome Testinvestor Help Logout

**My Portfolio**

- My Portfolio
  - My Holdings
  - Add Holdings
  - My Dividends
  - My Meeting Votes
  - Contact Us
- Account Management
  - Personal Details

**Meeting Votes administered by Share Registrars**

Select below the Holding and Meeting you want to submit your votes for.

Holdings:

Meeting:

**Figure 9 – My Meeting Votes – Select Meeting**

- To navigate to a particular meeting please select your holding in the holdings dropdown menu.
- Then select the meeting in the meetings dropdown menu.
- The meeting votes list is displayed on the screen.

- You can see how many votes you are entitled to and the latest time that you are allowed to vote on the screen (Figure 10).

**My Portfolio**

Welcome Testinvestor

[Help](#) | [Logout](#)

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▼ My Portfolio

- My Holdings
- Add Holdings
- My Dividends
- My Meeting Votes
- Contact Us

▼ Account Management

- Personal Details
- Change Details
- Change Bank Details
- Change Password
- Logout

[Share Registrar Portal](#) > [Meeting Votes](#)

## Mr Test Investor's Meeting Votes

[Print this page](#)

### Meeting Votes administered by Share Registrars

Select below the Holding and Meeting you want to submit your votes for.

Holdings:

Meeting:

---

The name of the proxy who will act on this instruction on your behalf.

The Chairman of the meeting

Name:

[Update](#)

**Please Note:**

You can submit your vote per resolution by clicking the 'Edit' button next to each resolution. Assign your vote by selecting from the 'Assign All To' list.

Once you are happy click update to apply your voting instructions.

If you encounter difficulties please contact us using the contact us [here](#).

**You can submit up to 30000 votes on each resolution by 12:00, 11 November 2013.**

### 3 Resolution Votes

	#	Description	Assign All To	For	Against	Discretionary	Withheld	Total
<a href="#">Edit</a>	01	Description 01						0
<a href="#">Edit</a>	02	Description 02						0
<a href="#">Edit</a>	03	Description 03						0

◀ Page  of 1 ▶
Results per page:

**Figure 10 – My Meeting Votes – View Votes**

- The default proxy is the chairman of the meeting. If you would like to appoint any other person as your proxy, please check the radio button before the text Name and enter the person's name in the box to the right. You can then click the Update button immediately below to submit the name of your proxy.
- To change the number of votes for a resolution, please click the Edit button next to that resolution. You can then enter the number of votes (up to the number that you hold) and click the Update button to submit your votes.
- Tip: if you would like to assign all of your entitled votes to a particular vote type, you can select the type in the Assign All To dropdown menu and then click the Update button. Your votes will be automatically added under that vote type.

## Contact US

- If you would like to contact us you can enter and submit your message in this page.

## Personal Details (Figure 11)

Share Registrar Portal > Personal Details

Personal Details Print this page

Welcome Testinvestor Help Logout

**My Portfolio**

- My Holdings
- Add Holdings
- My Dividends
- My Meeting Votes
- Contact Us

**Account Management**

- Personal Details
- Change Details
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- Logout

**Your Details:**

Use the drop down to choose the holdings you would like to see associated investor details for.

Accounts: Testclient plc - Investor ID

Investor ID : [Redacted]

Investor Name : MR Test Investor

Type : Private Individual

Address : Test Addressline 1, Test Addressline 2, TEST POS, GB

Com. Preference : Hard Copy

Telephone :

Email for Electronic Communication :

Joint Holder 1 :

Joint Holder 2 :

Joint Holder 3 :

[Change Details](#)

Figure 11 – Personal Details

- On this page, you can view your registered address, communication preference, telephone number, email address for electronic communications, and name(s) of joint holders (if any).
- To view the personal details for difference investor accounts, please select the account in the Accounts dropdown menu.
- You can click the Change Details link to change your personal details.

## Change Details (Figure 12)

Share Registrar Portal > Change Details

Change Details Print this page

Welcome Testinvestor Help Logout

**My Portfolio**

- My Holdings
- Add Holdings
- My Dividends
- My Meeting Votes
- Contact Us

**Account Management**

- Personal Details
- Change Details
- Change Bank Details
- Change Password
- Logout

**What do I need to do next?:**

Simply update your address below and click on the Update button.

Address Line1 : Test Addressline 1

Address Line2 : Test Addressline 2

Address Line3 :

Address Line4 :

Address Line5 :

Country : GB

Post Code : TEST POS

Email for Electronic Communication :

Com. Preference : Hard Copy

Update Cancel

**Please note:**

It may not be possible to update some holdings due to restrictions in place. If you encounter difficulties please contact us [here](#).

Please also check the *Change Bank Details* page. If *Payment Option* is set to **N/A**, then you will also need to contact Share Registrars so your account can be released.

**Communication Preference:**

Some companies offer an electronic communication facility to their shareholders. The company will write to its shareholders and invite them to make a communication preference. The terms used are described below.

**Deemed (Electronic)** - you did not respond to the company's request to make a communication preference and you are deemed therefore to have elected to receive notification in the post that a communication from the relevant company is available on the company's web site.

**Electronic** - you have elected to receive notification

Figure 12 – Change Details

- On this page, you can change your address, select your communication preference and provide the email for electronic communication.
- Please note that if you hold your shares in the CREST system through a CREST sponsor you need to contact your CREST sponsor to change your address.
- If you change your communication preference to Electronic, it is mandatory that you provide a valid email address in the Email for Electronic Communication box.
- Please note that any update will apply to all your holdings registered on the Share Portal.

## Change Bank Details (Figure 13)

The screenshot shows the 'Change Bank Details' page. At the top, there is a breadcrumb trail: 'Share Registrar Portal > My Portfolio > Bank Details'. The page title is 'Change Bank Details' with a 'Print this page' link. Below the title, it says 'Updating your bank details:'. A note box states: 'Please note: It is not possible to update some holdings online due to restrictions that may be in place. If you encounter difficulties please contact us using the contact us [here](#).' The 'Payment Option' is set to 'Bank Mandate'. The form is divided into two sections: 'Mandate Details' and '3rd Party Warrant Details'. The 'Mandate Details' section includes fields for Investor (MR Test Investor), Bank Name (Test Bank), Account Number (11111111), Sort Code (111111), and Roll Number. The '3rd Party Warrant Details' section includes fields for Name, Address Line 1 through 5, Postcode, and Reference. At the bottom, there are 'Update' and 'Cancel' buttons.

**Figure 13 – Change Bank Details**

- You can set up or change how you would like to receive your future dividend or interest payments on this page.
- The payment method can be cheque, bank mandate, or 3rd party warrant (a 3rd party warrant authorises us to make and post the payment to a 3rd party).
- If you choose to be paid by cheque, you do not need to provide any further detail.
- If you choose to be paid by bank mandate, you need to provide your bank name, account number, and sort code.
- If you choose to be paid by 3rd party warrant, you need to provide the 3rd party's name and address.

## Change Password

- On this page you can change your password by entering your old password and new password.
- We recommend that you change your password regularly to keep your Share Portal login secure.

## Logout

- Please click the Logout link in the navigation pane to safely log out of the Share Portal.



- Please keep your Share Portal login secure. It is very important that you log out once you finish using the Share Portal.

## Unable to Log in

### Forgot Your User Name

- To retrieve your user name please navigate to the Login page and click the Forgot Your User Name link.
- At the next page (Figure 14) please enter the email address you provided at registration and one of the investor IDs in your Share Portal portfolio.

*Figure 14 – Forgot Your User Name (Step 1)*

- At the next page (Figure 15) please enter your date of birth and answers to the security questions. Then please click the Submit button. If the information you provide is correct your user name is displayed on the screen.

*Figure 15 – Forgot Your User Name (Step 2)*

- If you registered before our recent Share Portal upgrade you were not asked to provide your date of birth at that time. In that case you will not be required to provide your date of birth when retrieving your user name. However, once you have retrieved your user name successfully you will be required to provide additional information including your date of birth. Please follow the instructions on the screen to provide the additional information. After you provide the additional information, a web activation code will be sent to your address by post. You will then need to log in again and enter the web activation code to reactivate your log in.

### Forgot Your Password

- If you forget your password you can reset it on our website. First you need to navigate to the Login page and click the Forgot Your User Password link.
- At the next page (Figure 16) please enter your user name and date of birth.

**Account Log in**

Register with us and manage your shares online!

[Register](#) | [Help](#) | [Login](#)

## Forgot Your Password?

Provide the information below to receive your password.

If you were not asked to provide your date of birth when you registered, please leave the date of birth field blank.

User Name:

Date Of Birth:

**Figure 16 – Forgot Your Password (Step 1)**

- Once your user name and date of birth are verified, you are required to enter the answers to the security questions that you have set up (Figure 17).

**Account Log in**

Register with us and manage your shares online!

[Register](#) | [Help](#) | [Login](#)

## Forgot Your Password?

Please answer the following question to confirm your identity. We will then send you your password via email.

User Name : Testinvestor

Security Question 1 :

Answer to Security Question 1 :

Security Question 2 :

Answer to Security Question 2 :

Security Question 3 :

Answer to Security Question 3 :

**Figure 17 – Forgot Your Password (Step 2)**

- If the answers are correct a new password is sent to the email address you provided at registration.
- You can then use the new password to log in and change the new password to a new password of your own choosing.
- If you have registered before our recent Share Portal upgrade you were not asked to provide your date of birth at that time. In that case you will not be required to provide your user name when resetting your password. However, once you reset your password successfully, you will be asked to provide additional information including your date of birth. Please follow the instructions on the screen to provide the additional information. After you provide the additional information, a web activation code will be sent to your address by post. You will then need to log in again and enter the web activation code to reactivate your log in.

### Still Unable to Log in

- If you are unable to retrieve your user name or reset your password, or for any other reason you are still unable to log in please contact us by phone or email.