IT'S AS EASY AS 1, 2, 3...

TO SUBMIT A DEALING REQUEST ON WEALTH INTERACTIVE

Utmost is the brand name used by a number of Utmost companies. This item has been issued by Utmost International Isle of Man Limited and Utmost PanEurope dac.

You can submit a dealing instruction in three easy steps on Wealth Interactive. It's seamless, convenient and efficient - you can submit your instructions at any time of day or night, wherever you are in the world.

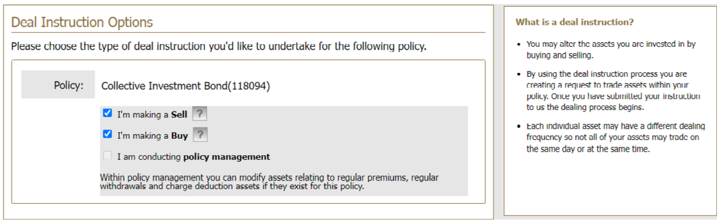
You should always seek financial advice before submitting a dealing request.

BEFORE WE BEGIN

Select your policy from the homepage of Wealth Interactive.

Once on the policy page, select **'New Deal Instruction'** on the right of the **'Policy actions'** menu.

STEP 1. CHOOSE THE TYPE OF DEAL INSTRUCTION

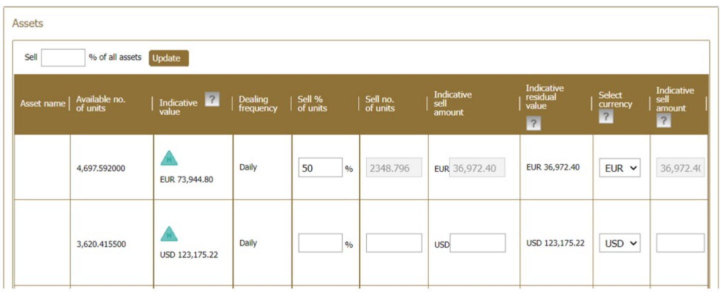


Select whether to request a sell, buy and/or policy management.

Then read and agree to the declarations underneath and select next.

STEP 2. SELECT THE ASSETS

TO SELL



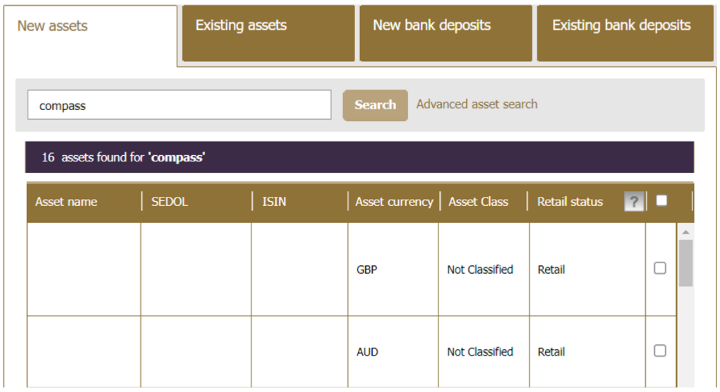
If you have requested a sell, all assets held will display. Enter either a percentage, number of units or amount to be raised for any asset that you would like to sell. You can also raise funds in a different currency from the asset if required.

You may see one of these icons alongside assets:

- If displayed, hover over the icon to show units which are blocked from dealing
- If displayed, hover over the icon to view the price that the value is calculated on
- If available, select to place a 'limit order' deal

STEP 2. SELECT THE ASSETS (CONT'D)

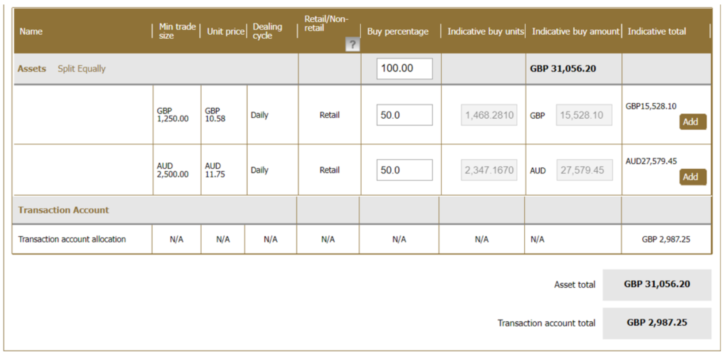
TO BUY



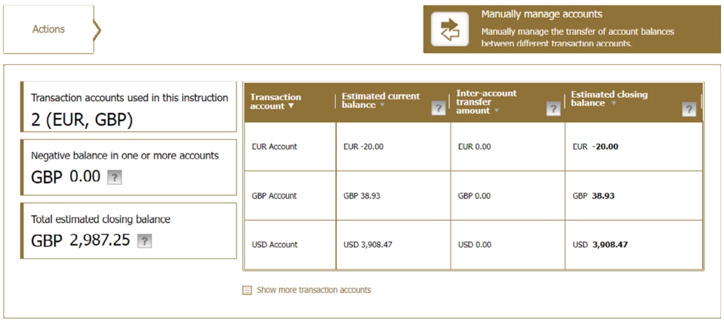
If you are requesting a buy, enter either the asset name, SEDOL code, or ISIN number to search for the asset. Then select **'Add asset(s)'** and repeat these steps until you have added all required assets.

If you want to invest in an asset you already hold, select the **'Existing assets'** tab and select which assets you want to purchase additional units of.

STEP 3. ENTER THE AMOUNT TO BUY



If you have any amount held in a transaction account, you can use the **'Manually manage accounts'** option to move cash between transaction accounts, e.g. to clear an overdrawn position.



After checking the summary, click on **'Submit'** at the bottom of the page. Your dealing instruction will now be acted on and you will see the contract notes on Wealth Interactive once we receive settlement.

If you need any help with Wealth Interactive, or have any questions, contact your financial adviser or visit: **www.utmostgroup.com**

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