Getting Started

Simply follow these steps to set-up your account on Grove Portfolio Online.
Steps 1 to 8 are done **once only**, at the time of establishing your Grove Portfolio Online Account.

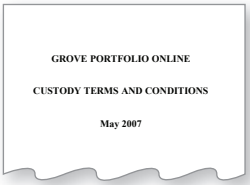
Review Our Offer

Registering

1

Read the GPO Brochure thoroughly and direct any questions to your Grove representative.

2

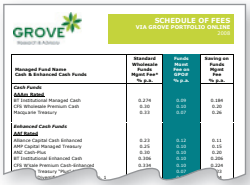

GROVE PORTFOLIO ONLINE

CUSTODY TERMS AND CONDITIONS

May 2007

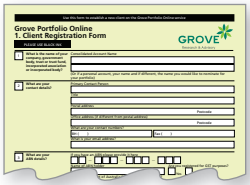
Review the Custody Terms and Conditions agreement. Direct any questions to your Grove representative.

3


SCHEDULE OF FEES
VIA GROVE PORTFOLIO ONLINE

Review the fee letter provided by Grove setting out *Grove fees, current manager fees and the Grove negotiated discounts.*

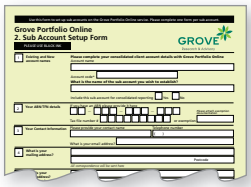
4


Grove Portfolio Online
1. Client Registration Form

Complete and sign a Client Registration Form. (Form 1)

This will register you or your organisation with the Grove Portfolio Online Service.

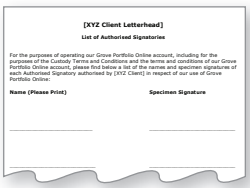
5


Grove Portfolio Online
2. Sub Account Setup Form

Complete and sign a Sub Account Setup Form. (Form 2)

This will set up your accounts for online access. If you require more than one sub account fill in a separate form for each account. This form also allows you to consolidate your accounts for reporting purposes.

6

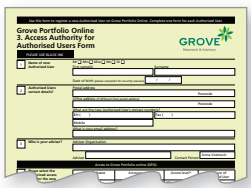

[XYZ Client Letterhead]

List of Authorised Signatories

Provide a list of Authorised Signatories *complete with sample signatures using a template supplied by Grove.*

This list will be used in future to verify the signatures of your Authorised Users where required.

7


Grove Portfolio Online
3. Access Authority for Authorised Users Form

Complete and sign an Access Authority for Authorised Users Form. (Form 3)

This will enable your nominated Authorised Users to access accounts online via their own password. A separate form is required for each Authorised User. Varying levels of access can be allocated depending on the role of each Authorised User. Please ensure each Authorised User reads the conditions on the back of the form.

5a

If the signatories that authorise Forms 1 and 2 and the Authorised Signatories List are not a director or secretary of your organisation, supply a copy of their delegated Authority or Power of Attorney

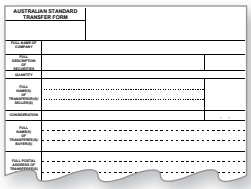
Funds Transfer

Invest Funds

EFT

Account Maintenance

8


AUSTRALIAN STANDARD TRANSFER FORM

Transfer existing assets onto Grove Portfolio Online (where applicable).

To transfer existing assets onto Grove Portfolio Online an Australian Standard Transfer Form will need to be completed. This will instruct the managers/investment registries to transfer assets to Grove Portfolio Online in the most appropriate manner. Grove will assist you throughout this process.

9

GROVE

Welcome to Grove Portfolio Online

Transact Online.

Once you have received your confidential user name and password from Grove, along with details of your associated High Yield Cash Account, (which will take several days) you can log into Grove Portfolio Online and invest. Buy transactions (applications) can be completed in minutes.

10

Transfer money for applications to your High Yield Cash Account on GPO.

Simply transfer funds by electronic funds transfer (EFT) to your ANZ High Yield Cash account, an account held in your name on Grove Portfolio Online. This procedure is outlined further on page 13 of the Grove Portfolio Online Brochure.

Account Name: ANZ Nominees Limited ACF Grove Portfolio Online - Clients
BSB: 012-909
Account No. **Your own account number will be** provided once your account has been established.

11

Grove Portfolio Online
4. Change of Contact Details

For changes to account details

This form is used for FUTURE changes to contact details. This form is NOT required as part of the current transition to the enhanced GPO service.

Your personal information provided to Grove on the Application Forms or otherwise is collected in accordance with Grove's Privacy Statement. By signing each Application Form you authorise Grove to collect, maintain, use and disclose your personal information in the manner set out in Grove's Privacy Statement, which is available on request at no charge or online at **www.groveadvisory.com.au**.

For any enquiries, please call Grove Research & Advisory on **02 8246 8800**.