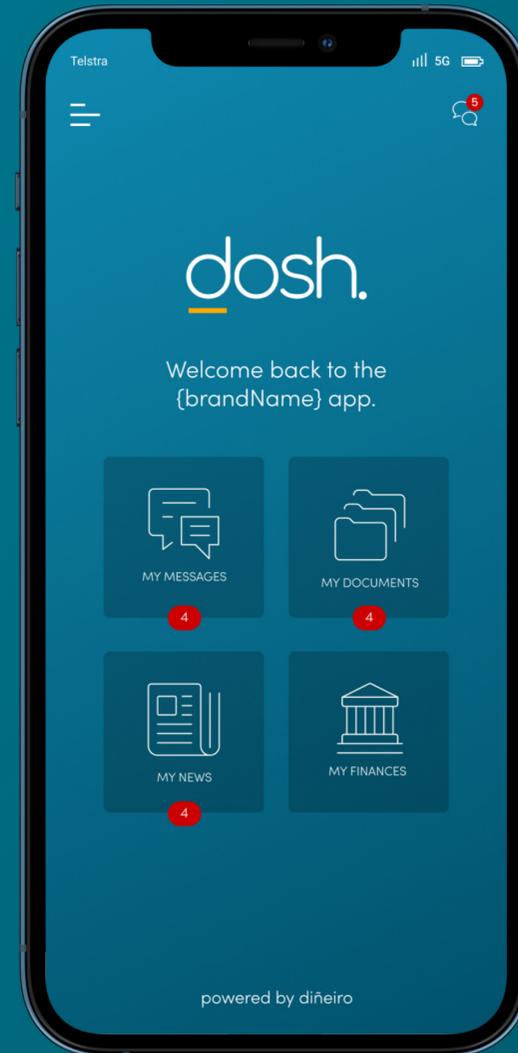




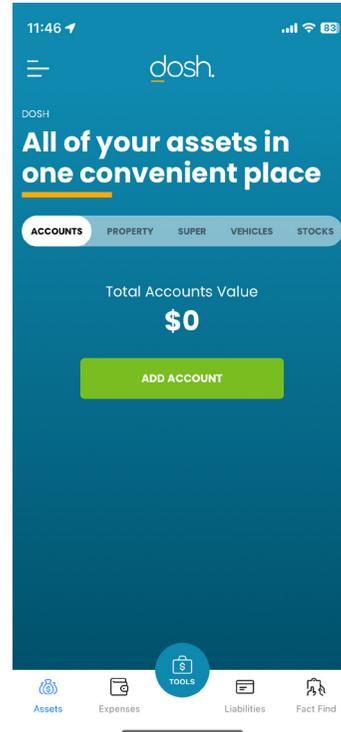
ACCOUNT SETUP GUIDE V1.1



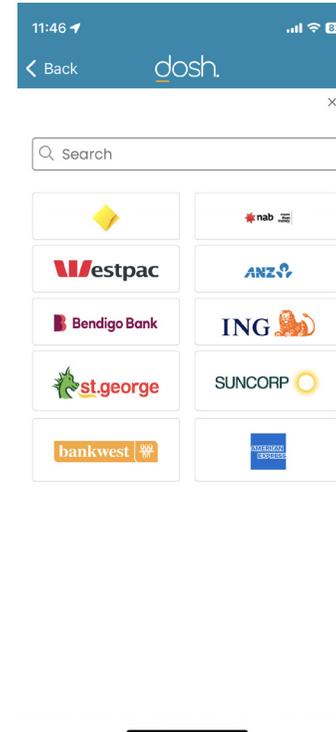
Adding accounts, loans & credit cards.

All bank accounts, loans and credit cards are now on Open Banking.

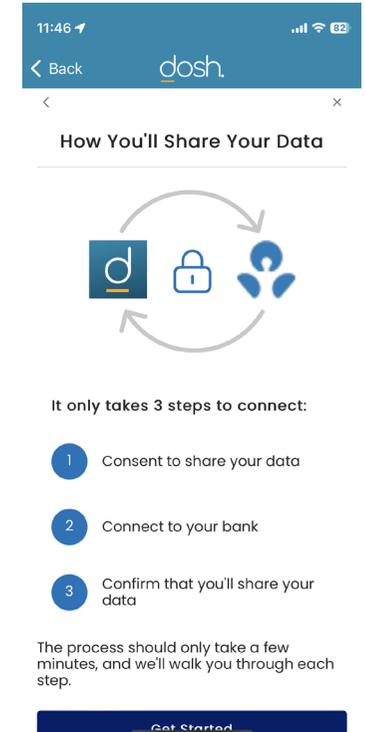
Open Banking is a global framework that gives consumers more control over the financial data and gives trusted advisors access to more data to make more informed recommendations.



In the finance section, select 'add account' from the accounts section.

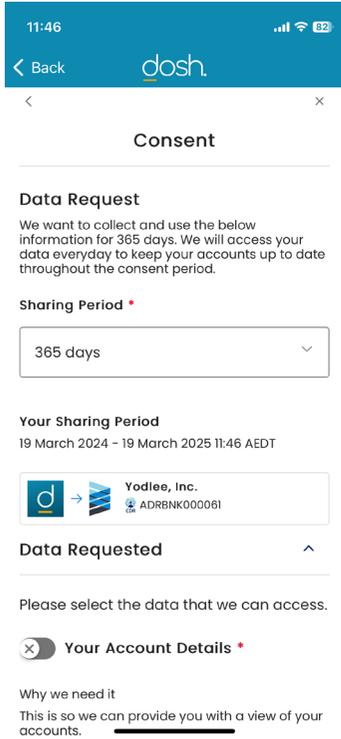


Use the search to find your financial institution



Review the consent steps and click 'get started'

Add Open Banking Accounts - Continued.



Review the consent details. In this page the user should select 365 days (this is default) and toggle the 'account details' and 'transaction details' from the off to the on position.

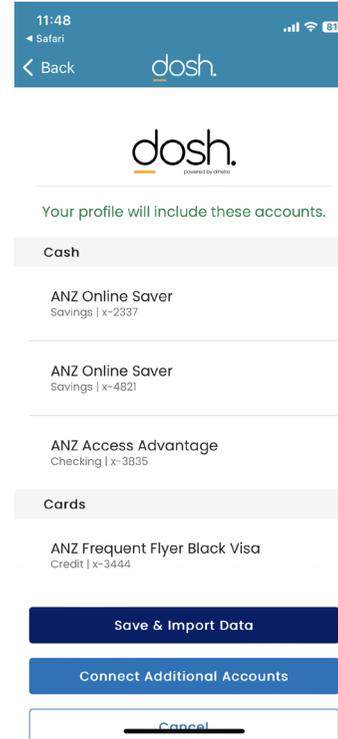


Bank

User is now taken via their web browser to their bank login screen where they will verify the accounts login details and select the specific accounts they wish to share with dosh and their trusted advisor

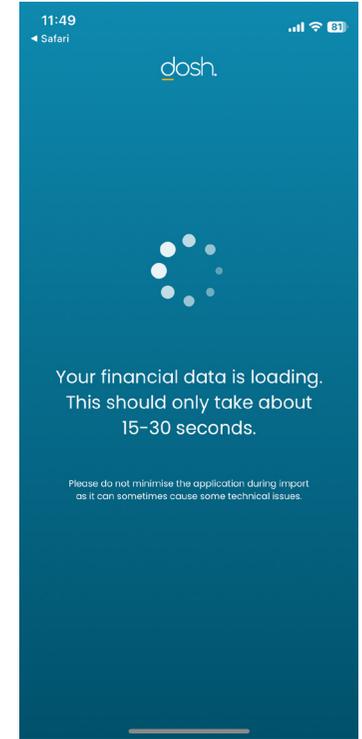


Client is brought back into the app and data is retrieved by the app



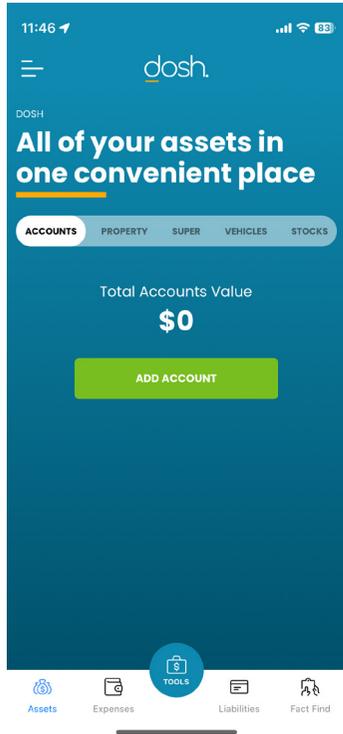
A list of approved accounts is presented to the client.

If the client wants to link multiple institutions, they can follow this process again by clicking 'connect additional accounts'. Otherwise, they should click 'save & import data' to finish the import process.

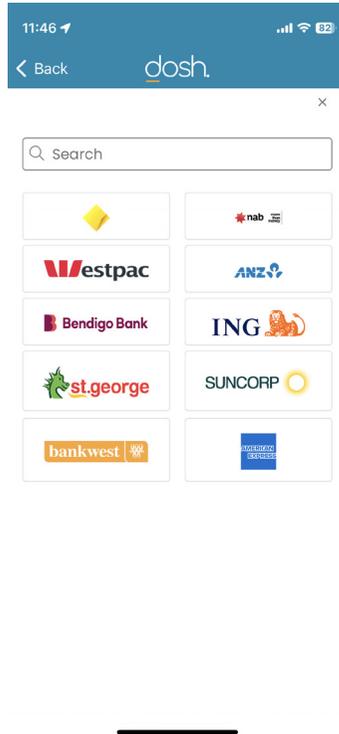


Data is then imported into dosh. The client is then transported back to the accounts page.

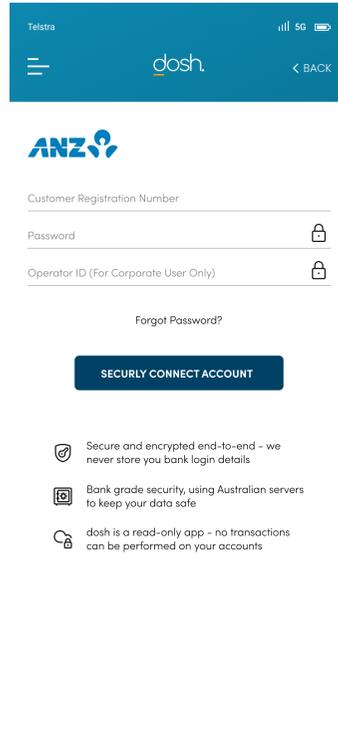
Add Investment & Super Accounts.



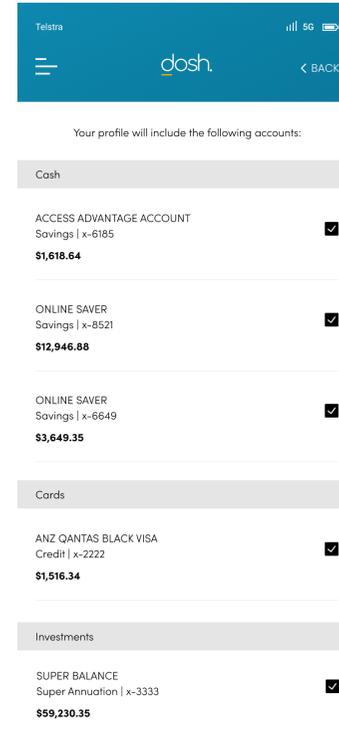
From the account screen, click 'add account'



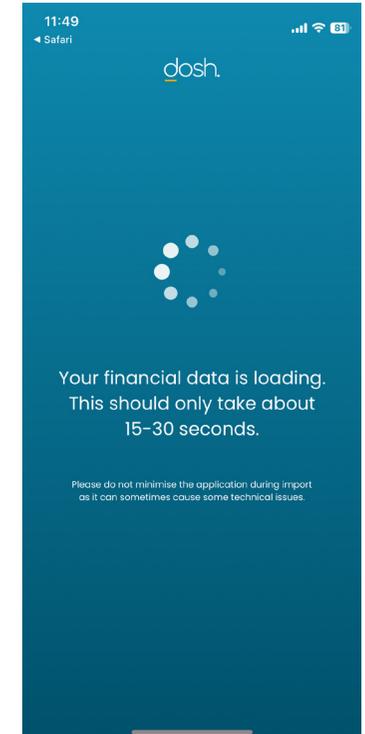
Use the search to find your financial institution



Login with your bank supplied login details. These are never stored on our systems



Select the accounts you want to link to dosh. If you have more than one institution to add, click 'save & link more accounts' to go back to the search page, otherwise click 'save & finish'



Data will import and be made available in the dosh app.

Misidentified Accounts.

From time to time, data from the bank in complete.

Sometimes we get incomplete data from banks, lenders or other financial suppliers. This can cause unwanted issues in our app so we have added a new screen which will only appear if we need clarification.

Once you have completed adding your accounts, if we need clarification, we will provide you a list of accounts and ask you to confirm the type of account they are. Once complete, we can be sure that the accounts will show properly in the app.

