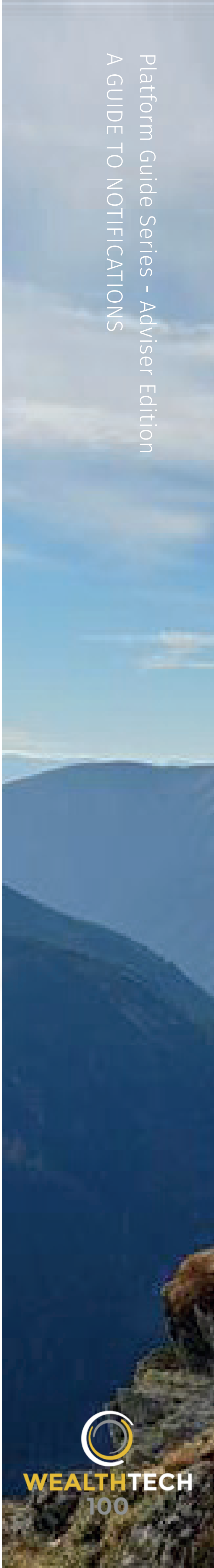
GROWTH INVEST

Platform Guide Series - Adviser Edition

A GUIDE TO NOTIFICATIONS



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INTRODUCTION

As an adviser or administrator, staying informed is essential for managing client portfolios and ensuring smooth operations. GrowthInvest notifications provide timely alerts about important activity across the platform, helping you respond quickly and maintain oversight. This guide explains how notifications work, how they can support your role, and how to manage them effectively.

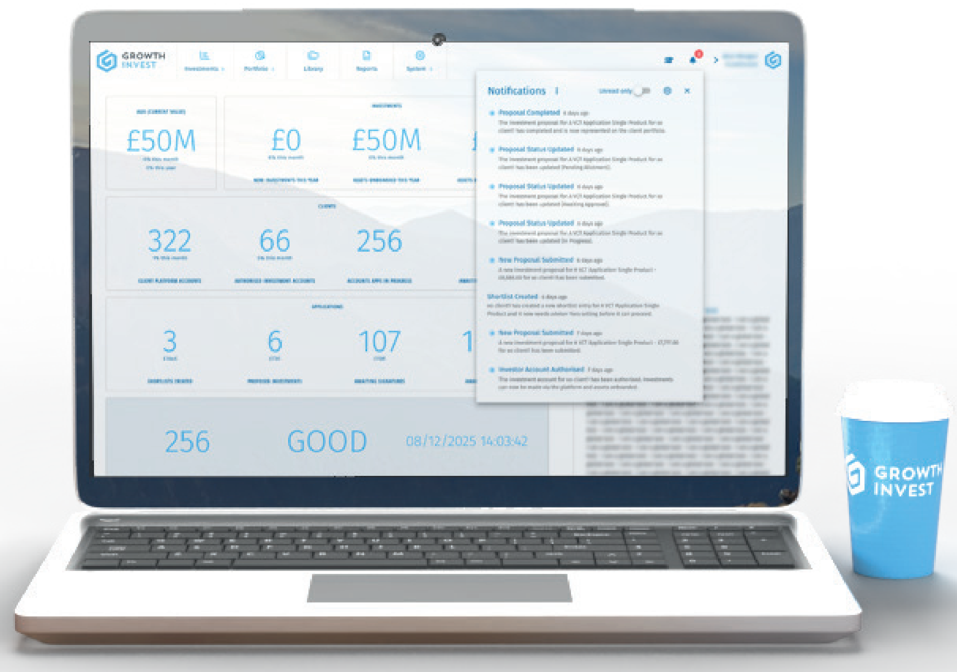
Notifications are designed to keep you updated on actions that matter most.

For advisers: these include new investment proposals and changes to the proposal status, client documents, or updates requiring your review.

For administrators: these include updates to client authorisation status, new documents being made available, and investments being made.

The notifications listed above are available for both user types as well as investor accounts, and we will be introducing additional notification types in the near future.

In short, by using notifications, you can ensure that you remain proactive on client accounts, from new investments to reporting.



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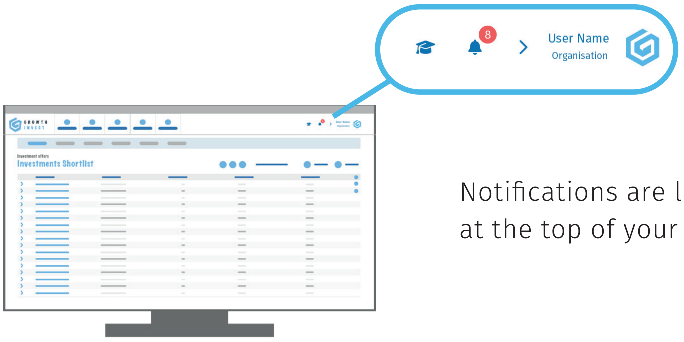
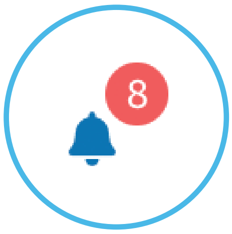
VIEWING YOUR NOTIFICATIONS

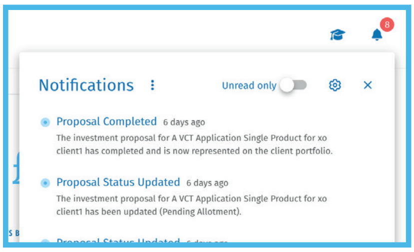


Notifications are located under the bell icon at the top of your screen.

When there are unread notifications, the bell will display a red circle with a number highlighting the number of unread notifications.

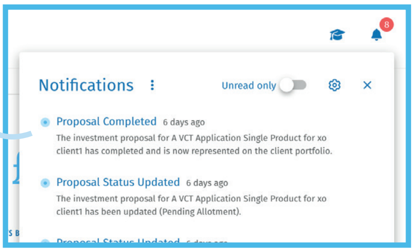


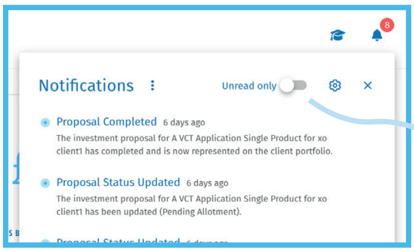
Clicking the bell opens your notifications list, where you can review recent activity.



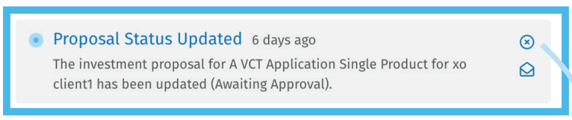
Selecting a notification will mark it as read and in addition, will take you directly to the relevant page or document, allowing you to act immediately without unnecessary navigation.

You can mark it as read without navigating to the related page by clicking on the blue dot on the left of the message, or by clicking on the envelope icon on the notification.





To see just your unread notifications, or a full view of all notifications, select the toggle on the notifications panel.



If you wish to clear a notification, click the “x” icon on a notification. Please though note, once a notification is cleared, the information is deleted and cannot be recovered.

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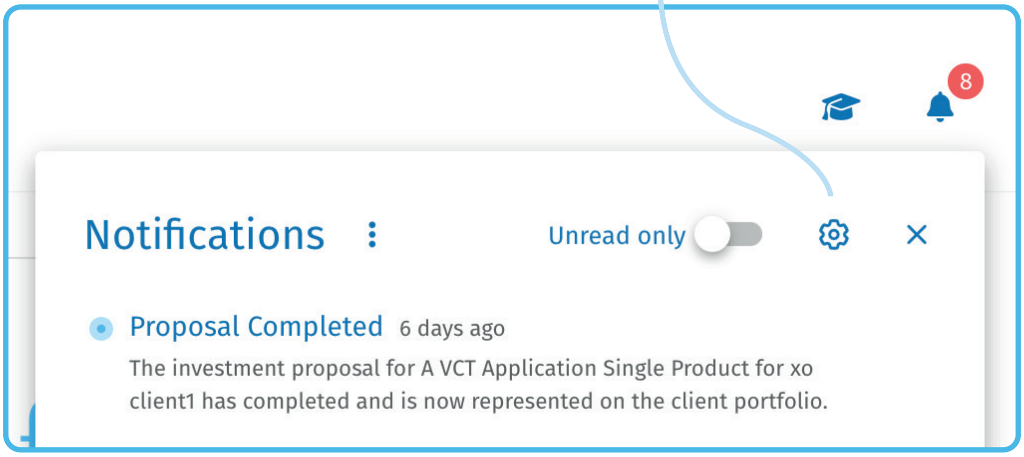
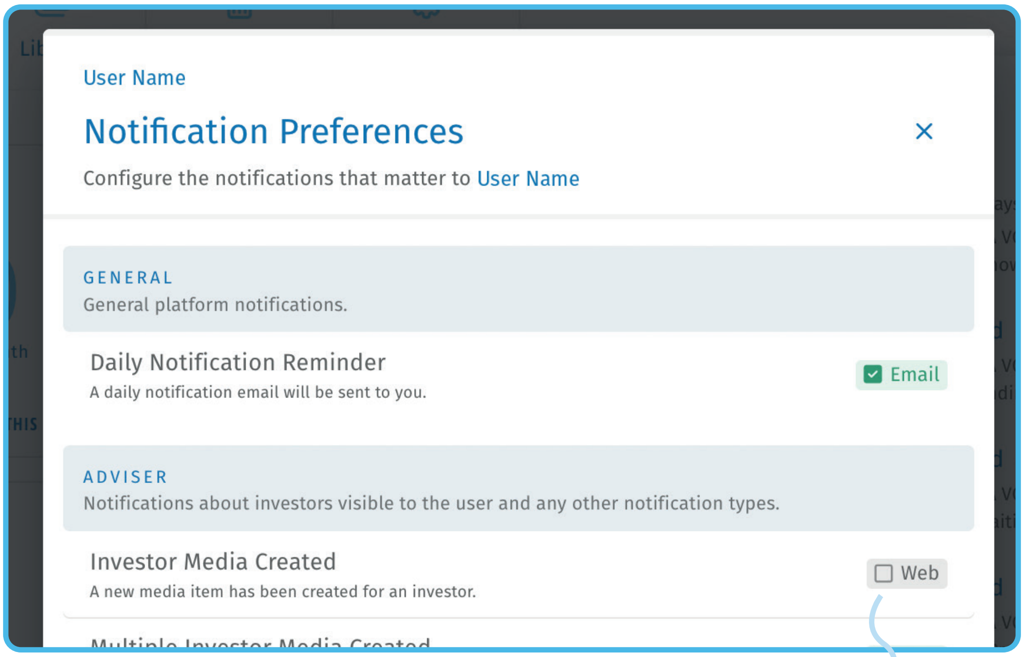
MANAGING YOUR NOTIFICATION PREFERENCES

Advisers and administrators often have different priorities, so notification settings can be customised to suit your workflow. To update your preferences, click the bell icon and then select the settings icon, a cog.



From here, you can choose whether to receive notifications within the platform, by email, or both. Web notifications appear instantly, while email notifications provide a daily summary of unread alerts. This flexibility ensures you stay informed whether you are actively using the platform or logging in less regularly.



To opt in or out of a notification, make sure to click the associated tick box. When the box is green and ticked, you are opted into that notification, and when the box is grey and unticked, you are opted out. Preferences can be changed at any time, and we recommend customising the preferences to your interests.

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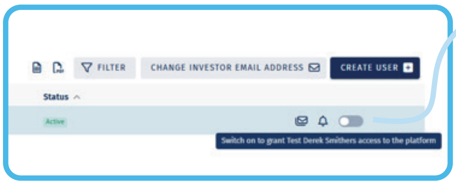
UPDATING CLIENT'S NOTIFICATION PREFERENCES ON THEIR BEHALF

This can be done via the Users tab on their Client Profile. Simply click the Bell icon, and opt the client in and out of their desired notifications.

As a reminder, if the client can access the platform via their own login, to check they have been granted access, review the toggle available on the same page.



If the toggle is grey, they do not currently have access. By clicking the toggle, an account verification email will be sent to the client allowing them to activate their account.

Alternatively, the client can update their own preferences in the same way adviser and admin users can, once logged into the platform.

EMAIL NOTIFICATIONS

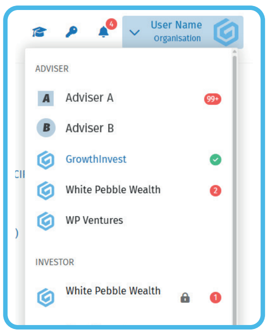
Email notifications are sent once per day at 8am, but only if you have unread notifications from the previous 24 hours. For security reasons, these emails do not include full details of the activity—they simply prompt you to log in for more information.

If notifications remain unread, you will not receive additional emails the following day. This approach keeps communication clear and avoids unnecessary duplication.

ROLE-SPECIFIC NOTIFICATIONS

If you hold multiple roles/accounts on the GrowthInvest platform, such as an adviser and investor account, notifications and preferences apply to the role that you're currently logged in as.

If you wish to view your notifications or active preferences, make sure to log in or pivot to the relevant account. As a reminder, by clicking on your name in the top-right corner you'll open a dropdown menu of the accounts you have access to. Simply click on the relevant account listed to switch accounts. At a glance you'll also be able to see unread notifications for each account, as the same red icons will be visible.



SUPPORT

We are constantly working to improve and evolve the platform to meet your needs and find new ways to help make your work easier. If you have feedback on this or any other part of the platform you'd like us to consider please contact our team at clientservices@growthinvest.com, along with any questions.

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