



GROWTH INVEST



GrowthInvest Platform FAQs

Notifications

Version Date: 08/12/2025



WEALTHTECH 100

Introduction

Welcome to your Notifications guide. Notifications help you stay informed about important updates and actions on the GrowthInvest platform. Below are answers to common questions:

1. What are notifications?

Notifications are short messages about activity on the GrowthInvest platform that keep users updated when something important happens, such as new documents, proposals, or other activities.

2. Where can notifications be seen?

Notifications appear under the bell icon at the top of the screen. If you have unread notifications, the bell icon will gain a red circle and a number indicating the number of unread notifications. Clicking the bell shows recent notifications so users can quickly access updates and clicking on a notification will mark it as read and take you to the subject of the notification.

3. How can notification preferences be managed?

Preferences can be managed by selecting the bell icon and then clicking the gear (settings) icon. Users can choose which notifications to receive by web or email.

4. Are notifications role-specific?

Yes. If a user has multiple roles, preferences and notifications apply to the role currently active. Preferences and notifications shown will be relevant to the role you currently have selected, and the menu showing your roles will have an indication of the number of unread messages in that role.

5. What types of notifications are available?

- Web Notifications: Short messages displayed in the app.
- Email Notifications: A daily summary email if there are unread notifications from the past 24 hours.

6. When are email notifications sent?

Daily emails are sent at 8am if there are unread notifications from the last 24 hours. If notifications remain unread, no additional email will be sent the next day.

7. Do emails include full details about the notification?

No, to ensure the security and privacy of client information, emails only indicate that activity occurred and prompt the user to log in for details.

8. Can notifications be cleared?

Yes. Notifications can be cleared from the list but once cleared, they cannot be retrieved. You mark a notification as read or clear it from the notifications menu.

9. Will I receive notifications for actions I take myself?

No. Notifications are only sent for actions taken by others, so you won't get one for something you've just done.

10. Will more notification options be coming soon?

Yes. This first set of notifications is just the beginning of multiple planned releases. We welcome your feedback and suggestions for new notifications.

If you have any questions or would like to share your thoughts, please contact our Client Services team at clientservices@growthinvest.com.



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