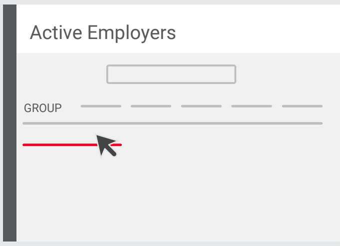
ALLANGRAY

Group Retirement Annuity

Creating online applications for new members

How to add new employees and trigger the online application process:

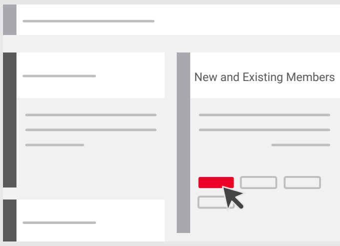
1



Once you have logged into the Group RA Portal
https://groupra.allangray.co.za

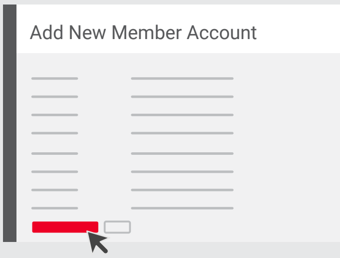
You will need to select your group name.

2



On the home page on your right will be the "New and Existing Members" section, click on the "Add Employee" option.

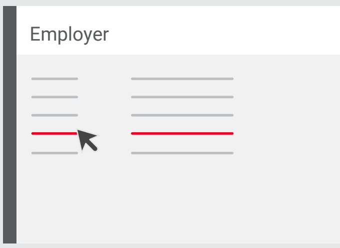
3



The 'Add New Member Account' screen will open and you will need to capture the details of the new member viz. surname, name, initial, ID number, DOB, email address and contribution amount. Once all the information has been captured, click the "Save and Send Email Request" option.

An email will be sent to the new member's email address provided containing the online application link and instructions.

Employees with no email address



If a member does not have a personal email address, you can add yourself as a "Helper" before adding the new employee and you will receive the email to complete the online application.

If you have already added the new employee, click "Save" on the "Add New Member Account" screen and navigate back to the Employer section and click on the arrow, in the Employer View screen, scroll to the "Helper email" field and capture your email address

- You can then search for the newly added member in the "New and Existing Members" section and then click the "Send Email Request" option.
- The email to complete the online application will be emailed to you and you can now assist the member to complete his/her application form.

ALLAN GRAY

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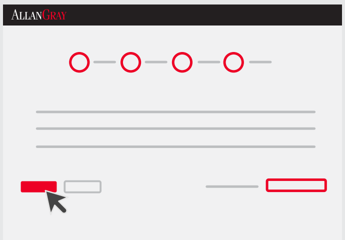
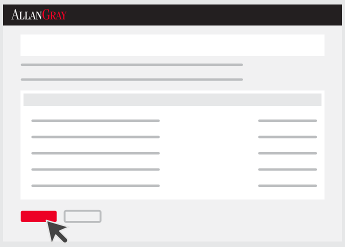
Member online process:

1



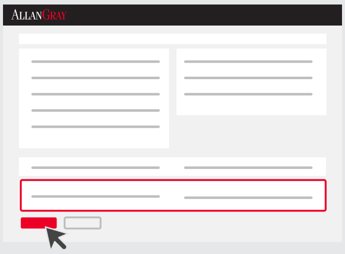
In the email sent to the new member will be a link to their online application. Once they click on the link it will take them to a landing page where they would need to capture their ID number and click "Next" to open their application.

2



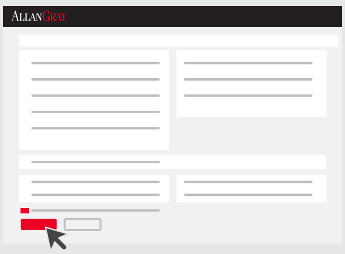
The next page will reflect the employee's monthly contribution and their default fund selection. They can choose to keep the default fund selection or amend it to a fund of their choosing and would then Click "Next". The fund selection must be Reg28 compliant.

3



Next the employee will complete their personal, contact and beneficiary details then click "Next".

4

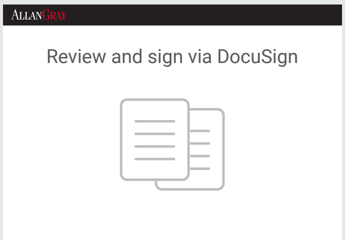


A summary page will now open which contains all the information the employee has captured for them to check. If everything is in order the employee will need to tick the terms and conditions box then click "Submit".

We will email the employee a copy of the application to review and sign electronically via DocuSign.

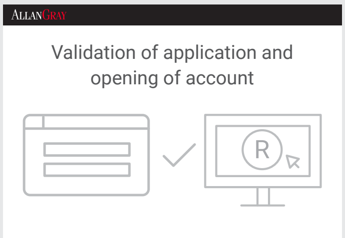
Member online process (continued):

5



1. The member clicks on "Review Document" and signs via DocuSign.
2. After the member signed, it will automatically be emailed to the IFA to review and countersign (if applicable).
3. Once fully signed a copy will be emailed to the member, IFA (if applicable) and to Allan Gray.
4. The member will also receive an Investment Overview and Conditions of Membership documents.

6



1. Allan Gray will validate the application and request any outstanding information and a copy of the members South African bar-coded ID (or valid passport if foreign national) if applicable.
2. On receipt of the outstanding requirement and the first payment by the employer we will open the members investment account.
3. The member will receive a welcome pack via email and login details to a secure online account.