WEALTH GEN
INVESTOR

ACCOUNT SETTINGS / CLIENT GUIDE 01

Updating your address

How to change the residential or mailing address on your account in Client Portal.

WHERE	YOU'LL NEED	COMPLETED WHEN
Client Portal	Proof of address	Approved by our Accounts team

STEP BY STEP

1 Log in to Client Portal

Sign in with your username and password.

2 Open Settings

Click the user menu — the head and shoulders icon in the top right corner — then choose **Settings**.

3 Find Account Profile

Under **Account Settings**, locate the **Account Profile** section.

4 Select the profile to edit

Click the profile you want to change.

5 Update the address

Edit the relevant fields, then click **Continue** to advance through the screens.

6 Enter your confirmation number

If you do not use the Secure Login System for two-factor authentication, you will be emailed a confirmation number. Enter it and click **Continue**. If no email arrives, click **Request Confirmation Number** to have a new one sent. Then click **OK**.

7 Upload proof of address

Proof of address must be uploaded for a residential address change.

8 Let us know

Once you have submitted the change, contact us so we can follow it up with our Accounts team for approval.

NEED A HAND?

If anything on this page looks different to your screen, or a step does not complete, contact our customer service desk before trying again.

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Screens, menu names and button positions shown in this guide may differ slightly from what you see, as the platform is updated from time to time. Screenshots are for illustration only.

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