WEALTH GEN
INVESTOR

TRADING / CLIENT GUIDE 02

Adding trading permissions

How to request access to additional markets and product types on your account.

WHERE
Client Portal

PROCESSING TIME
24 to 48 hours

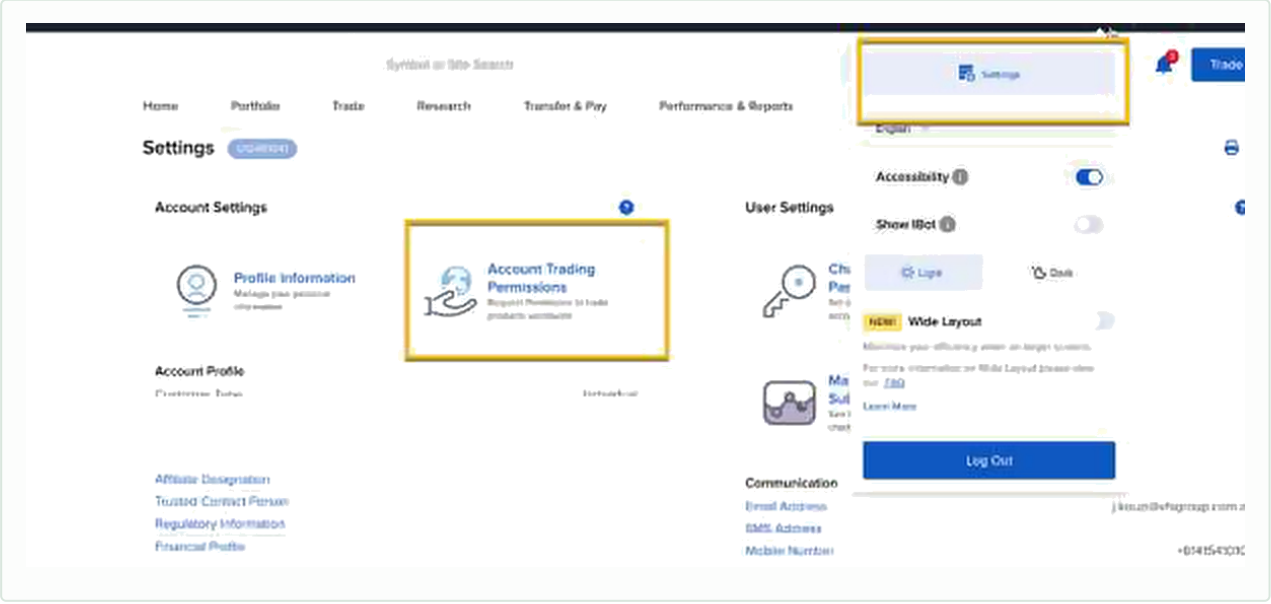
STEP BY STEP

1 Open Settings

Log in to Client Portal, click the user menu in the top right corner and choose **Settings**.

2 Go to Account Trading Permissions

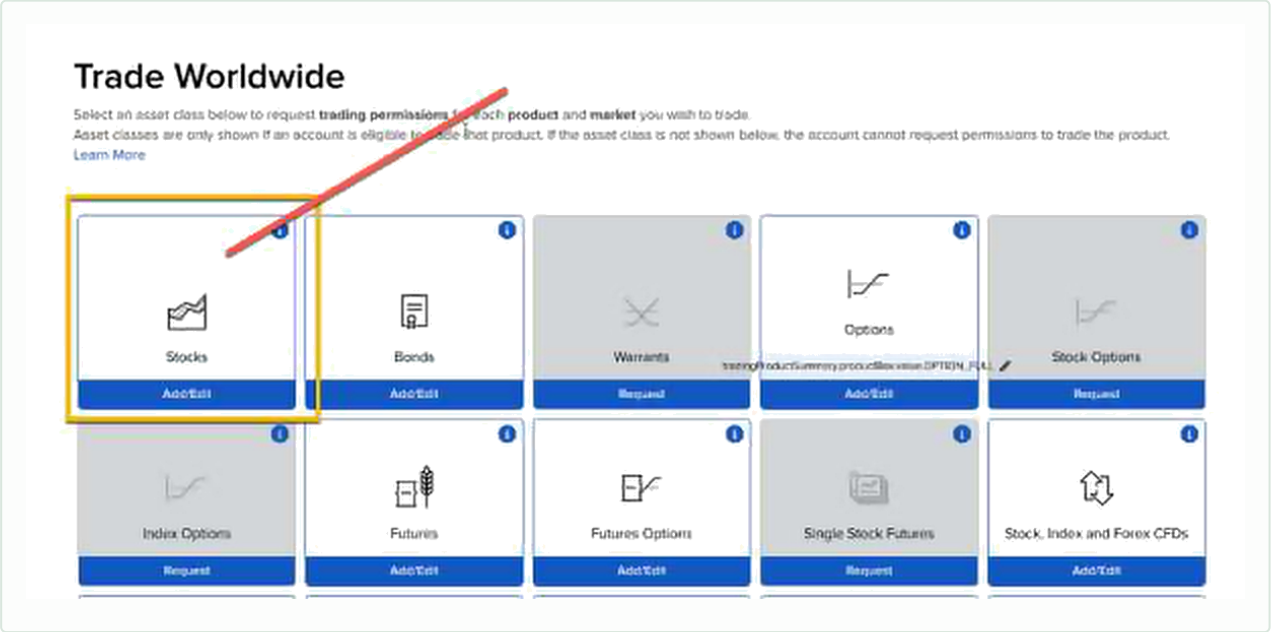
Under **Account Settings**, select **Account Trading Permissions**. From here you can review the permissions already on your account.



Account Trading Permissions in the Settings menu

3 Add the product type

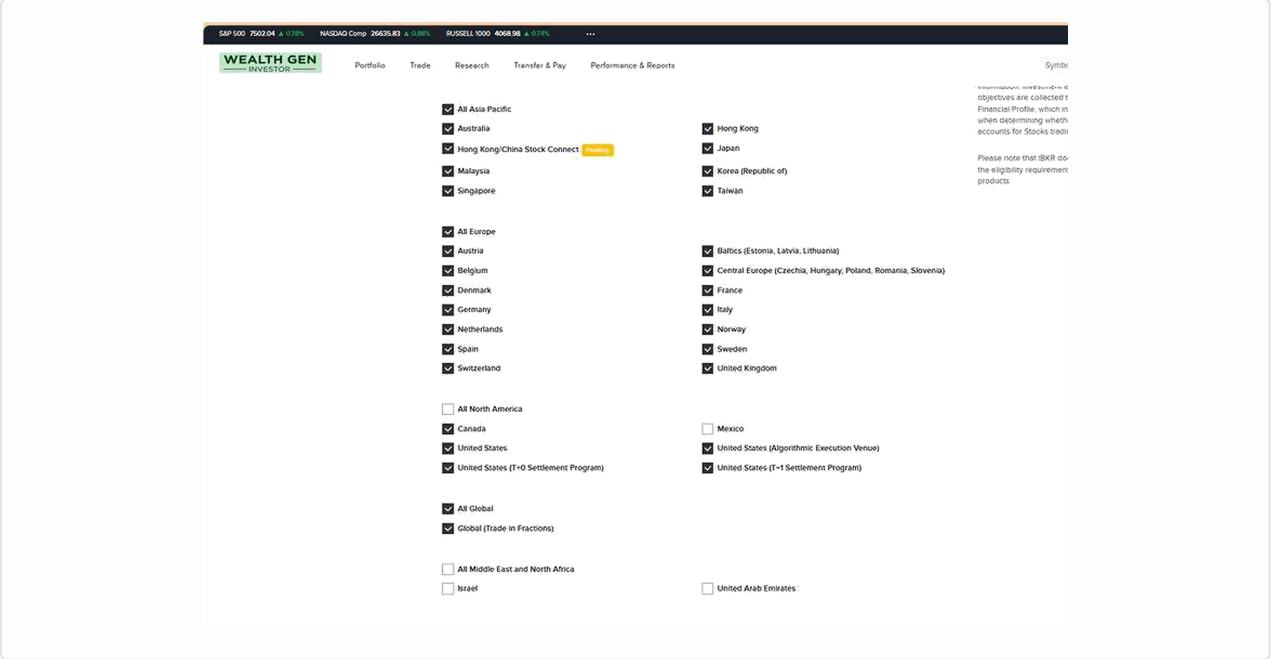
Click **Add/Edit** against the product you want to trade — for example, **Stocks**.



Select the product type you want to add

4 Select your markets

Tick the markets you wish to trade, then continue through to the end of the process to submit the request.



Choose the markets to add to your account

NOTE

Updates can take 24 to 48 hours to be reflected. In the meantime you can keep trying to place the trade, or check your trading permissions in Settings. Once the status no longer shows as **Pending**, the update is complete and you will be able to trade that market.

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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