ACCOUNT / CLIENT GUIDE 16

Adding Stock Trading Permissions

How to request permission to trade stocks on additional markets, such as Hong Kong or Denmark, through your WealthGen Investor account.

WHERE
Client Portal

YOU'LL NEED
Your live account username and password

THE PATH
Settings → Account Trading Permissions → Stocks

BEFORE YOU START

You can only place orders on a market once your account has permission to trade there. Make sure your financial profile is up to date before you request new permissions.

STEP BY STEP

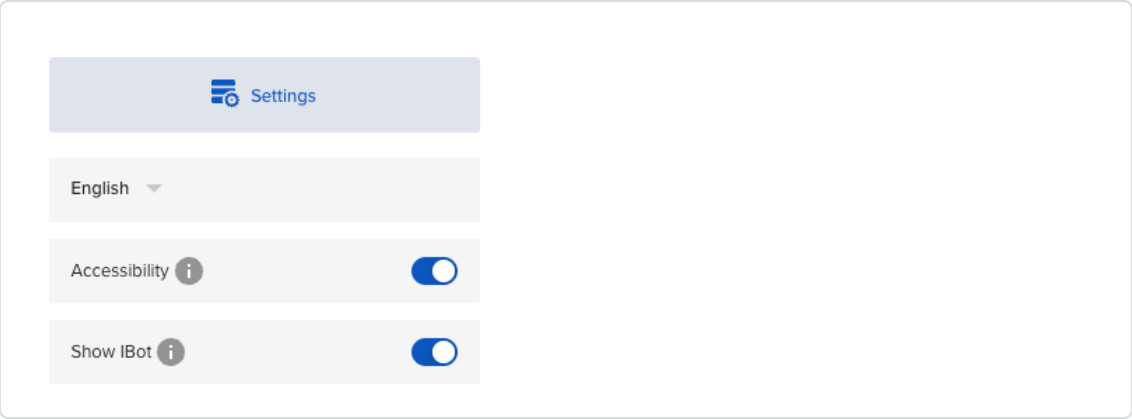
1 Log in

Sign in to your WealthGen Investor portal at **wealthgeninvestor.com** with your trading account username and password.

2

Open Settings

Click the **person icon** at the top right of the screen, next to your name, then choose **Settings**.

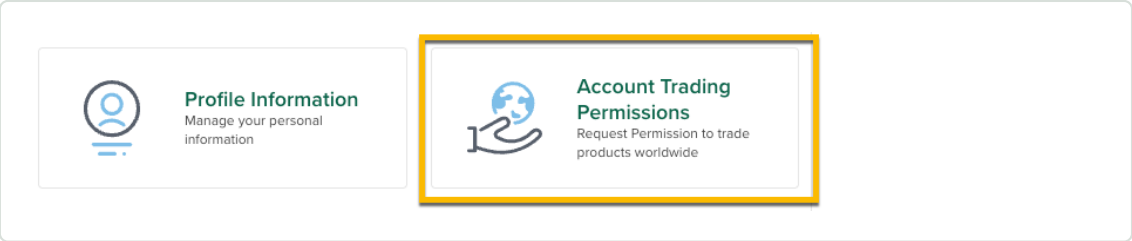


Person icon → Settings

3

Open Account Trading Permissions

Under **Account Settings**, select **Account Trading Permissions**.

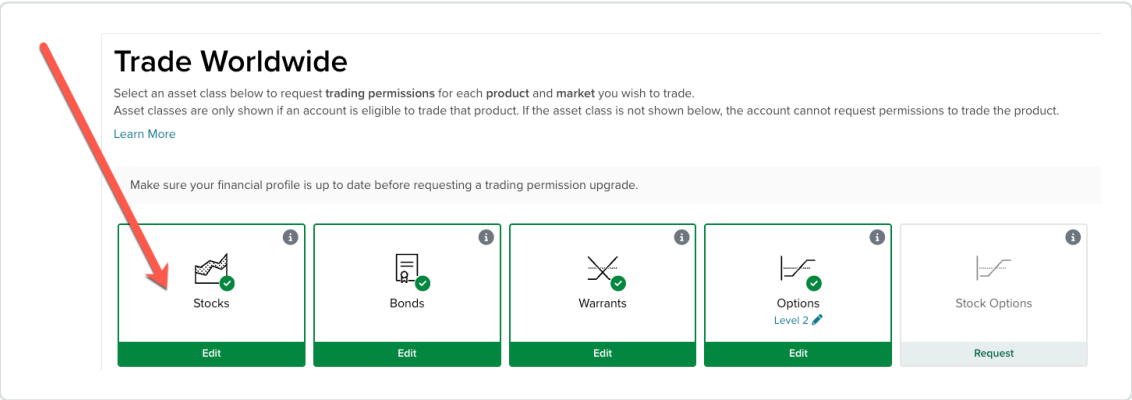


Account Trading Permissions

4

Edit your Stocks permissions

Under **Trade Worldwide**, find the **Stocks** tile and click **Edit**.

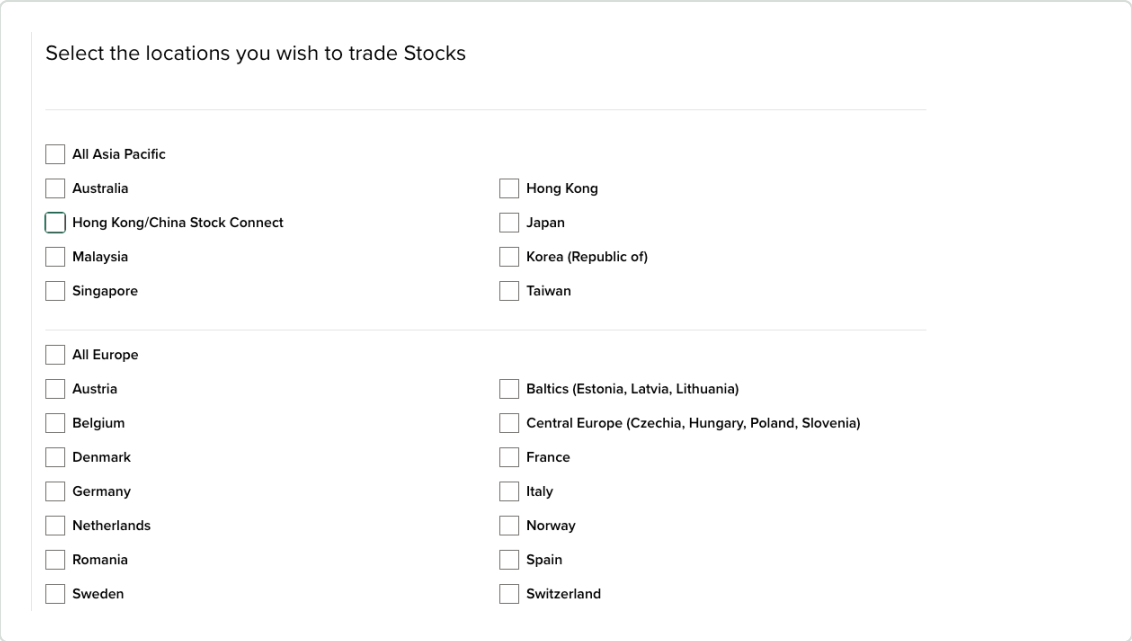


Stocks → Edit

5

Select the markets you want

Tick each location you wish to trade stocks in, for example **Hong Kong** or **Denmark**. Markets are grouped by region, and you can tick as many as you need.



Select the locations you wish to trade stocks

6

Follow the prompts

Click **Continue** through each screen and follow the prompts to submit your request.

> **YOU MAY BE ASKED SOME QUESTIONS**
>
> Depending on your account type, you may be asked to provide or confirm your financial information, investment experience and objectives. These make up your financial profile, which is used to decide whether to approve the permissions you have requested. WealthGen Investor does not disclose the eligibility requirements for any product.

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.

info@wealthgeninvestor.com · 1300 280 330 · wealthgeninvestor.com

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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