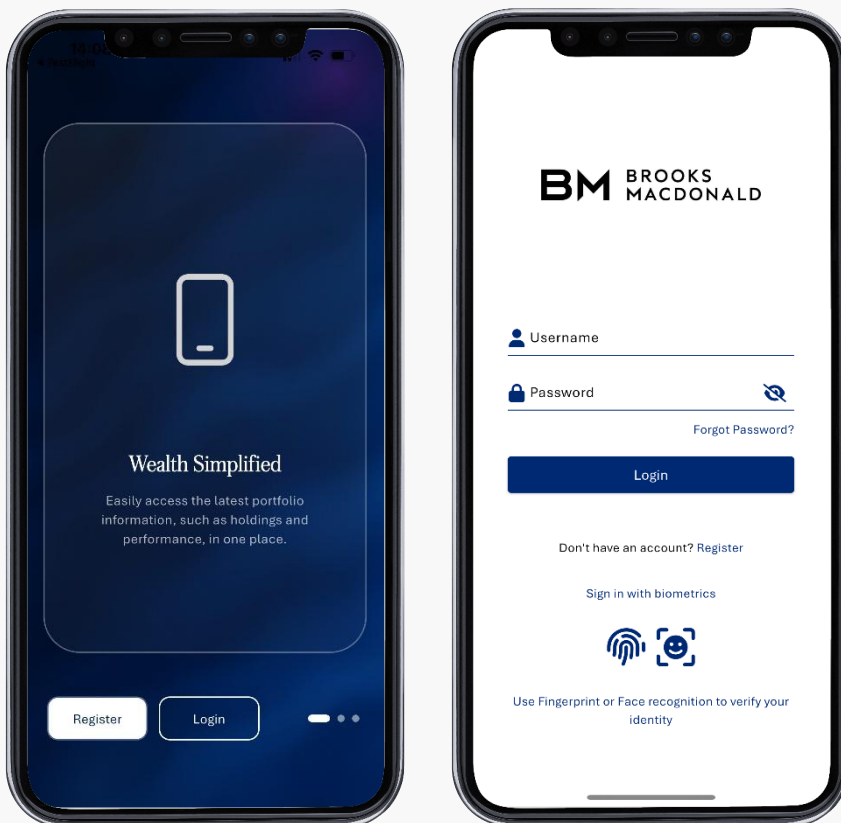


Brooks Macdonald Mobile App

FAQs Document



Contents

- 1. Before You Start 2
 - 1.1 Who can use the app?..... 2
 - 1.2 What devices are compatible? 2
 - 1.3 What do I need to use the app?..... 2
- 2. Logging In..... 2
 - 2.1 I have an InvestBM login but have forgotten my credentials. What should I do?.... 2
 - 2.2 Does the app support facial or fingerprint recognition?..... 2
- 3. In-App Features 3
 - 3.1 Does the app support dark mode? 3
 - 3.2 What can I do on the app? 3
 - 3.3 How do I update my details? 3
- 4. Additional Support..... 3
 - 4.1 Who should I contact if I encounter any issues with the app?..... 3

1. Before You Start

1.1 Who can use the app?

The app is for clients whose assets are held in custody with Brooks Macdonald, as well as IFAs and paraplanners.

1.2 What devices are compatible?

The app requires the following:

- **Apple devices** – Requires iOS 16 or later.
- **Android devices** – Requires Android 12 or later.

1.3 What do I need to use the app?

You will need to download the Brooks Macdonald app from the Apple App Store or Google Play store.

You will also need your InvestBM user ID and password. If you already have these, you can log straight into the app.

If you have not yet received your InvestBM user ID, please use this link to register: [InvestBM Registration | Brooks Macdonald](#). Our dedicated support team will arrange access and send your credentials to you via email.

2. Logging In

2.1 I have an InvestBM login but have forgotten my credentials. What should I do?

If you know your user ID, you can visit www.investbm.com and click on forgot password to reset it. You will then be able to use your new password to log into the app.

If you have forgotten your user ID, please contact your Brooks Macdonald representative.

2.2 Does the app support facial or fingerprint recognition?

Yes – the app links to your device security settings, so you can use fingerprint or FaceID for easier access after your first log in. These can be enabled or disabled at any time within the app settings.

3. In-App Features

3.1 Does the app support dark mode?

Yes – the app will default to your device system settings. You can switch between dark mode and light mode at any time within the app settings.

3.2 What can I do on the app?

You will be able to view the following:

- Portfolio summary and values as at the previous working day
- Dashboard with asset allocation, top and bottom holdings and account summary
- Individual holdings
- Transactions
- Performance overview
- Quarterly valuations, tax packs and contract notes
- Other documents
- Link to help centre and FAQs

3.3 How do I update my details?

Clients can now request changes to their personal information directly through the app, by heading to "My Account", and submitting a request to update their address, email, or phone number.

IFAs and paraplanners can now submit a request for a meeting or call back in the app.

Once received, Brooks Macdonald will process the request and confirm once it's complete.

If the request is time-sensitive, you should contact your usual Brooks Macdonald representative directly.

3.4 (Paraplanners only) How do I request and view “IFA Costs & Charges” report in the app?

You can request the report within the app using the “Request a document” functionality.

This report can be viewed fully using the Google Sheets app.

4. Additional Support

4.1 Who should I contact if I encounter any issues with the app?

Our dedicated support team are available to assist between 9am and 5pm Monday to Friday (excluding bank holidays). You can contact them at investbmsupport@brooksmacdonald.com or by contacting your Brooks Macdonald representative.