



## INVESTOR UPDATE – 10 March 2022

### Halifax Investment Services Pty Limited (In Liquidation) (Halifax AU) Halifax New Zealand Limited (In Liquidation) (Halifax NZ) (together the Halifax Group)

#### Frequently Asked Questions (FAQs) regarding Investor Portal

The purpose of this document is to assist Investors with registering and submitting a claim through the Investor Portal. It should be read in conjunction with the previous FAQ document issued on 21 February 2022.

If you require further assistance after reading this document, please send an email to one of the following mailboxes:

<b>Investor Portal access</b>	au-fmhalifaxportal@kpmg.com.au
<b>Investor Portal functionality</b>	Refer to the “Help” menu icon located on the home page of the Investor Portal
<b>Category 3 and Category 5</b>	au-fmhalifaxcat3@kpmg.com.au
<b>Statement requests and Halifax Account queries</b>	helpdesk@halifaxonline.com.au
<b>Court documents and Investor Updates</b>	<a href="https://home.kpmg/au/en/home/creditors/halifax-investment-services.html">https://home.kpmg/au/en/home/creditors/halifax-investment-services.html</a> <a href="https://home.kpmg/au/en/home/creditors/halifax-nz-limited.html">https://home.kpmg/au/en/home/creditors/halifax-nz-limited.html</a>

**1. I do not have an ABN (Australian Business Number), how do I complete my Investor Portal registration?**

This step is only required for Australian based corporate investors. If you do not hold an ABN, simply click the icon “I don’t have an ABN” and “Continue” to proceed to the next page.

**2. I am unable to enter my bank account number as there is a number limit. How to I proceed?**

The Investor Portal has been amended to allow account numbers up to 20 digits. Instructions have also been added to assist New Zealand Investors with account numbers containing branch information. If you have not done so, please login and submit your bank account information again.

**3. My bank account does not have a BSB. What do I enter in this section?**

The default bank county that appears in the “Bank details” page is Australia. If your bank is outside Australia, click on the country icon and select the relevant country. The required fields will change accordingly. Do not type the country in.

When entering the bank account information, do not enter any hyphens or spaces.

If your bank account information does not fit in the required fields, please contact KPMG to request assistance.



**4. I am unable to upload documents to the Investor Portal as the file size is too large. How do I provide documents to support my claim?**

If you are unable to upload a Trust or Superannuation Deed in full, please provide certified copies of the following:

- title page;
- table of contents / index pages;
- execution page;
- page listing all beneficiaries; and
- any variations (if relevant).

If you continue to encounter problems, documents may be emailed to [au-fmhalifaxportal@kpmg.com.au](mailto:au-fmhalifaxportal@kpmg.com.au). Please ensure that your Halifax account number and a contact phone number are included in any email correspondence.

**5. I submitted by identity verification and the status says 'Not started' and I can't proceed. How do I complete my claim?**

Your identity verification may have been declined or the verification may still be in progress.

Please save your claim progress and exit the Investor Portal to allow sufficient time for the identity check to process. If the status has not changed after several hours, select the 'Reset' icon under the 'Verification' tab to restart the verification process.

Please note that you must take a photo of the physical identity card or passport and not a paper copy or digital copy saved to an electronic device.

**6. I do not reside in Australia or New Zealand, or hold identification issued by an Australian or New Zealand government entity, and my Resident / National Identity card is not recognised. How do I complete the identity check?**

The Veriff identification check recognises Passports written in English. We understand that some Investors are experiencing issues with Resident / National Identity cards and older passports that are not written in English.

Please attempt to complete the identity verification, however If you are experiencing the abovementioned issue, please email [au-fmhalifaxportal@kpmg.com.au](mailto:au-fmhalifaxportal@kpmg.com.au) for further instructions on completing the identity verification and claim submission process.

**7. I want to change my Account from being in the name of my Super Fund to my own personal name. Can I do this?**

It is not possible to change an account type from a Superannuation Fund or Corporate account to an Individual account. The Liquidators and KPMG staff will not accept any such requests.

**8. My Account name is spelt incorrectly. How do I verify my identity?**

Where your Account name is spelt incorrectly, you may delete the pre-populated details (including First name, Last name and Email address) in the 'Verification' tab of the Investor Portal and re-type your name with the correct spelling. You do not need to request a name change at the registration stage. Refer to 'Step 5: Verification' of the Investor Updated dated 21 February 2022 for more information.