

## Getting started with Registry Direct

How to set up your account, check your holding balance, update your personal details, view statements and more.

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# Set up your account

Once you've received an invitation in the post or in your email inbox, click the **Set up your account** button.

This will take you to the 'Create account' page, where you can enter your name, and create a password. Click **Next**.

The screenshot shows an email from Amber. The header includes the Amber logo and the name 'Amber'. The body of the email is as follows:

Dear Caroline,

We invite you to set up an online account on our registry system for your holding/s in Amber Pty Ltd.

The online registry system is provided by Registry Direct and allows you to view and manage your details at any time, including to:

- check your holding balance
- update your address details
- advise your banking details for direct crediting
- provide your country of tax residency and your tax number

To set up your account click the button below.

A green button with a white right-pointing arrow and the text 'Set up your account' is highlighted with a purple border.

Once you have set up your account you will be able to access it by clicking this link: <http://local.registrydirect.com.au/login/amber/>. We recommend that you bookmark this



The screenshot shows the 'Create account' page on the Registry Direct website. The page layout is as follows:

registrydirect

## Create account

You have been invited to set up your online registry account.

To accept this invitation, please complete the form below, agree to the terms of use and click on the **Next** button.

Given name:

Surname:

Email address:

Password:

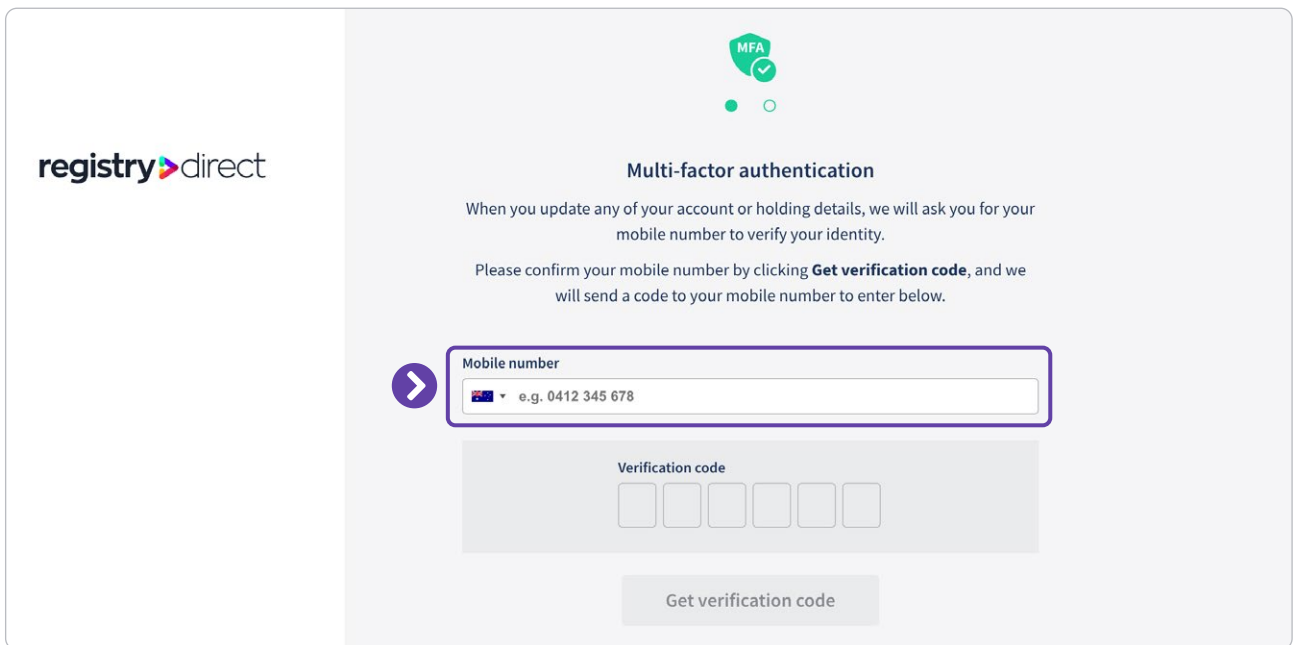
Confirm password:

I agree to Registry Direct's [terms of use](#).

**Next**

For the security of your account, we ask for your mobile phone number. Enter your mobile phone number, then click **Get verification code**.

A verification code will be sent to your mobile phone. Enter the verification code, then click **Next**.



registry direct

MFA

### Multi-factor authentication

When you update any of your account or holding details, we will ask you for your mobile number to verify your identity.

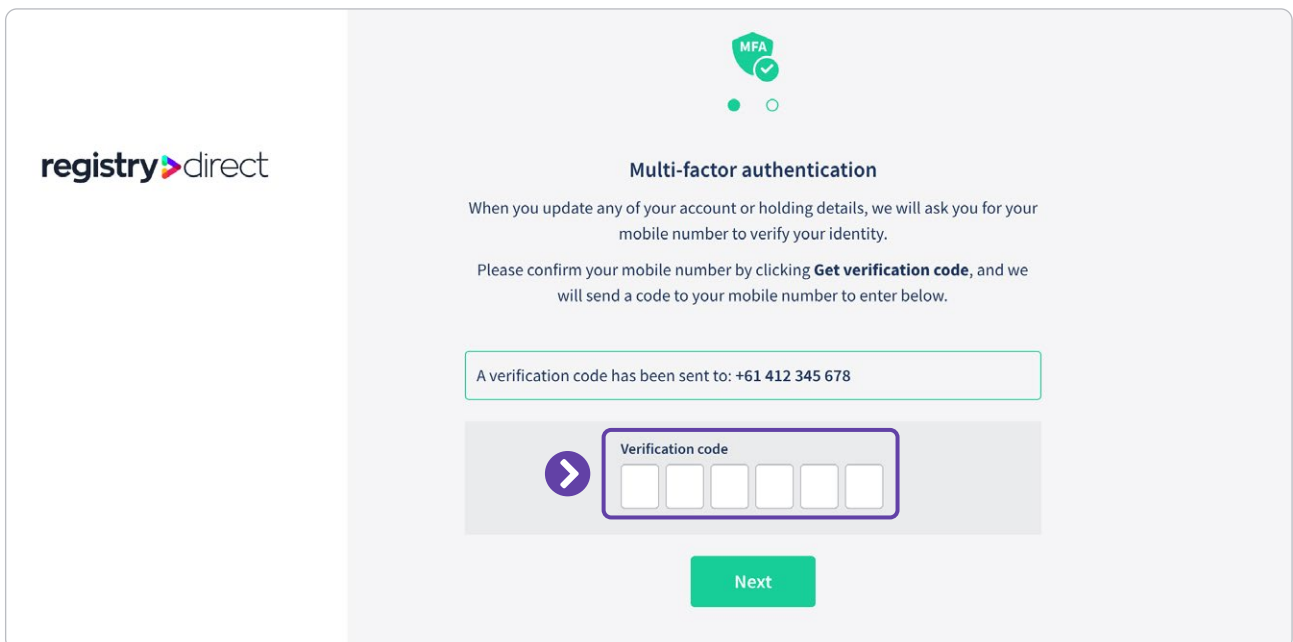
Please confirm your mobile number by clicking **Get verification code**, and we will send a code to your mobile number to enter below.

➔ Mobile number

🇬🇧 e.g. 0412 345 678

Verification code

Get verification code



registry direct

MFA

### Multi-factor authentication

When you update any of your account or holding details, we will ask you for your mobile number to verify your identity.

Please confirm your mobile number by clicking **Get verification code**, and we will send a code to your mobile number to enter below.

A verification code has been sent to: +61 412 345 678

➔ Verification code

Next

You may also provide an alternative email address. Enter your alternative email address, then click **Get verification code**.

A verification code will be sent to your alternative email address. Enter the verification code, then click **Finish sign-up**.

If you do not wish to enter an alternative email address at this stage, click **Skip this step and sign up**.

registry direct

**MFA**

### Multi-factor authentication

You may also provide an alternative email address to use for verification when your mobile device is not available.

Please enter an alternative email address below and confirm it by clicking **Get verification code**. We will send a code to your alternative address to enter below.

Alternative email address

Verification code

Get verification code

[Skip this step and finish sign-up](#)



registry direct

**MFA**

### Multi-factor authentication

You may also provide an alternative email address to use for verification when your mobile device is not available.

Please enter an alternative email address below and confirm it by clicking **Get verification code**. We will send a code to your alternative address to enter below.

A verification code has been sent to: **caroline.goldsmith@altemail.com**

Verification code

[Re-send verification code](#)

**Finish sign-up**



# Log in to your account

When you have created your account, you can log in by going to [www.registrydirect.com.au/login/](http://www.registrydirect.com.au/login/)

The screenshot shows the login interface for Registry Direct. On the left, the logo "registrydirect" is displayed. On the right, the "Login" section contains the following elements:

- Email address**: A text input field with the placeholder "Email\*".
- Password**: A text input field with the placeholder "Password\*".
- [Forgot password?](#): A link for users who have forgotten their password.
- Log in**: A prominent green button to submit the login credentials.



# Check your holding balance

Holdings information is available on the Investor centre home page.

**Investor centre** All issuers ▼ Caroline Goldsmith

**Update details**  
Click here to update your bank, tax or address details

- Holdings
- Messages
- Meetings
- Payments
- Tax statements
- Transactions
- Investor forms
- Contact

**Account: Ms Caroline Goldsmith**

As at: 30 Sep 2022 📅 **Total value: 0**  
AUD 21,875.00

Issuer	Security	Balance	Price	Unpaid amount	Value
Amber	Amber Pty Ltd Ordinary Shares	12,500	AUD 1.75	AUD 0.00 <span>👤 2</span>	AUD 21,875 <span>➔</span>

**Account: Gamma Pty Ltd <Goldsmith Super Fund A/C>**

As at: 30 Sep 2022 📅 **Total value: 0**  
AUD 55,020.00

Issuer	Security	Balance	Price	Unpaid amount	Value
VISTA Managed Funds	Vista Managed Funds Partly Paid Units	10,000	AUD 0.84	AUD 5,880.00 <span>👤 1</span>	AUD 2,520.00 <span>➔</span>
Amber	Amber Pty Ltd Ordinary Shares	30,000	AUD 1.75	AUD 0.00 <span>👤 1</span>	AUD 52,500.00 <span>➔</span>

**Corporate calendar**

- Annual General Meeting** 26 Aug 2022  
Offline voting cutoff 5:00pm  
Amber Pty Ltd 📅 iCal 📅 Google
- Annual General Meeting** 26 Aug 2022  
Online voting cutoff 5:00pm  
Amber Pty Ltd 📅 iCal 📅 Google
- Annual General Meeting** 26 Aug 2022  
Meeting start 3:00pm  
Amber Pty Ltd 📅 iCal 📅 Google
- Dividend payment** 22 Sep 2022  
Payment date 📅 iCal 📅 Google
- Demo Trust**
- Investor lunch** 22 Sep 2022  
Amber Pty Ltd 📅 iCal 📅 Google



# Update your email address or password

To update the email address or password you use to log in with, click on your user name in the top right corner, and then click **User settings**.

On the 'Your account settings and preferences' page, click **Update email address** or **Update password**.

The screenshot shows the 'Investor centre' interface for 'Ms Caroline Goldsmith'. A dropdown menu is open from the user profile icon in the top right, showing 'User settings' and 'Sign out'. The main content area displays two account summaries:

- Account: Ms Caroline Goldsmith**  
As at: 30 Sep 2022  
Total value: AUD 21,875.00
- Account: Gamma Pty Ltd <Goldsmith Super Fund A/C>**  
As at: 30 Sep 2022  
Total value: AUD 55,020.00

Below each summary is a table of holdings:

Issuer	Security	Balance	Price	Unpaid amount	Value
Amber	Amber Pty Ltd Ordinary Shares	12,500	AUD 1.75	AUD 0.00	AUD 21,875
VISTA	Vista Managed Funds Partly Paid Units	10,000	AUD 0.84	AUD 5,880.00	AUD 2,520.00

On the right, there is a calendar view of events for Amber Pty Ltd, including Annual General Meetings and a Dividend payment.



The screenshot shows the 'Your account settings and preferences' page. The 'Email address' field is set to 'CAROLINE.GOLDSMITH@EMAIL.COM'. Two buttons, 'Update email address' and 'Update password', are highlighted with a purple box. Below this are sections for 'Contact details', 'Communication preferences', and 'Security'.

**Contact details**

- Given name: Caroline
- Family name: Goldsmith
- Phone number: +61425123456

**Communication preferences**

- Annual reports: Email
- Issuer information: Email
- Statements: Email
- Notice of meeting and proxy: Email

**Security**

- Mobile number: +61 XXXXXXXX555
- Alternate email address: CAROLINE.GOLDSMITH@ALTEMAIL.COM





# Update your mobile phone number

Click on your user name in the top right corner, and then click **User settings**.

To update the mobile phone number you would like to be contacted on, click **Edit** next to 'Contact details'.

To update the mobile phone number which we send verification codes to, click **Update mobile number** under 'Security'.

Investor centre All issuers Caroline Goldsmith

Update details  
Click here to update your bank, tax or address details

Holdings Messages Meetings Payments Tax statements

Account: Ms Caroline Goldsmith

As at: 30 Sep 2022 Total value: AUD 21,875.00

Issuer	Security	Balance	Price	Unpaid amount	Value
Amber	Amber Pty Ltd Ordinary Shares	12,500	AUD 1.75	AUD 0.00	AUD 21,875

User settings  
Sign out

Amber Pty Ltd  
Annual General Meeting 26 Aug 2022  
Online voting cutoff 5:00pm  
Amber Pty Ltd  
Annual General Meeting 26 Aug 2022  
Meeting start 3:00pm



Investor centre All issuers Caroline Goldsmith

Update details  
Click here to update your bank, tax or address details

Holdings Messages Meetings Payments Tax statements Transactions Investor forms Contact

Your account settings and preferences

Email address: CAROLINE.GOLDSMITH@EMAIL.COM Update email address Update password

Contact details Communication preferences

Given name: Caroline Annual reports: Email  
Family name: Goldsmith Issuer information: Email  
Phone number: +61425123456 Statements: Email  
Notice of meeting and proxy: Email

Security

Mobile number: +61 XXXXXXXX555 Update mobile number

Alternate email address: CAROLINE.GOLDSMITH@ALTEMAIL.COM Update alternate email address



# View the details of a holding

Holdings are grouped by investor. Each investor has their own page where you can specify the address, bank account details for direct crediting, and tax information for that investor.

From the home page, click on a holding to view and edit holding details.

**Investor centre** All issuers Caroline Goldsmith

**Update details**  
Click here to update your bank, tax or address details

**Holdings**

**Account: Ms Caroline Goldsmith**

As at: 30 Sep 2022 Total value: AUD 21,875.00

Issuer	Security	Balance	Price	Unpaid amount	Value
Amber	Amber Pty Ltd Ordinary Shares	12,500	AUD 1.75	AUD 0.00	AUD 21,875

**Account: Gamma Pty Ltd <Goldsmith Super Fund A/C>**

As at: 30 Sep 2022 Total value: AUD 55,020.00

Issuer	Security	Balance	Price	Unpaid amount	Value
VISTA	Vista Managed Funds Partly Paid Units	10,000	AUD 0.84	AUD 5,880.00	AUD 2,520.00

**Corporate calendar**

- Annual General Meeting: 26 Aug 2022, 5:00pm
- Annual General Meeting: 26 Aug 2022, 5:00pm
- Annual General Meeting: 26 Aug 2022, 3:00pm
- Dividend payment: 22 Sep 2022
- Investor lunch: 22 Sep 2022



**Investor centre** Amber Pty Ltd Caroline Goldsmith

**Update details**  
Click here to update your bank, tax or address details

**Holdings**

**Account:** Ms Caroline Goldsmith Investor number (SRN): 190017697757

[Show contact details summary](#)

Account details **Holdings** Tax details Notes and Documents

**Holdings**

Expand	Issuer	Security class	Category	Balance
<input checked="" type="checkbox"/>	Amber Pty Ltd	Ordinary Shares	Issuer sponsored	12,500

**Holding statement**

Date range: 07/07/2021 - 09/08/2021 Download statement for this holding

The first date is from the start of the day and so reflects the previous days closing price. For example, for a period of a calendar year select 1 January to 31 December.



# Update your address details

The platform allows you to have a different address for each of your investors.

From the home page, click on a holding belonging to the investor. Go to the **Account details** tab, then click **Edit** next to the address.

**Investor centre** Amber Pty Ltd Caroline Goldsmith

**Update details**  
Click here to update your bank, tax or address details

Holdings Messages Meetings Payments Tax statements Transactions Investor forms Contact

**Account details** Holdings Tax details Notes and Documents

Account: Ms Caroline Goldsmith Investor number (SRN): I90017697757

[Show contact details summary](#)

**Investor details**

**Reg One**  
Investor

<b>Name:</b>	Caroline Goldsmith	<b>Address:</b>	<a href="#">Edit</a>
<b>Date of birth:</b>	10 Oct 1970	43 Liam Street	
<b>Email address:</b>	CAROLINE.GOLDSMITH@EMAIL.COM	Pakenham VIC 3000	
<b>Country of citizenship:</b>	AUSTRALIA	AUSTRALIA	
<b>Mobile number:</b>	+61 412 345 678		

The registered owner is the beneficiary of the holding: Yes [Edit](#)



# Add your accountant or financial adviser

The platform allows you to add one or more read-only users, such as an accountant or adviser, to each holding. Read-only users will also be copied in to selected communications sent to you.

From the home page, click on the holding. Under **Read-only users**, enter an email address and click **Invite user**.

The screenshot shows the 'Investor centre' interface for 'Amber Pty Ltd'. The user is identified as 'Caroline Goldsmith'. The 'Holdings' tab is selected and highlighted with a purple box. Below the 'Holdings' section, there is a table with one entry: 'Amber Pty Ltd' with 'Ordinary Shares' and a balance of '12,500'. Below the table, there is a 'Holding statement' section with a date range of '07/07/2021 - 09/08/2021' and a 'Download statement for this holding' link. Below the statement, there are three sections: 'Payment instructions', 'Contact details', and 'Communications preferences'. The 'Read-only users' section is highlighted with a purple box and contains the following text: 'There are currently no read-only users with access to this holding. To invite read-only users to access this holding, enter their email address. Read only users will have login access to view this holding and will be copied in on selected email communications (such as payment statements) sent to you.' Below this text is a form with an 'Enter email address' input field, an 'Invite user' button, and a 'View email preview' link.

Investor centre Amber Pty Ltd Caroline Goldsmith

Update details  
Click here to update your bank, tax or address details

Holdings Messages Meetings Payments Tax statements Transactions Investor forms Contact

Account details **Holdings** Tax details Notes and Documents

Account details  
Account: Ms Caroline Goldsmith  
Investor number (SRN): I90017697757  
[Show contact details summary](#)

Expand	Issuer	Security class	Category	Balance
<input type="checkbox"/>	Amber Pty Ltd	Ordinary Shares	Issuer sponsored	12,500

Holding statement  
Date range: 07/07/2021 - 09/08/2021 [Download statement for this holding](#)  
The first date is from the start of the day and so reflects the previous days closing price. For example, for a period of a calendar year select 1 January to 31 December.

Payment instructions [edit](#)  
Dividend reinvestment plan: No Participation  
Bank account country: AUSTRALIA  
BSB: [Reveal](#)  
Account number: [Reveal](#)  
Account name: C M Goldsmith

Contact details  
Contact name: CAROLINE GOLDSMITH  
Phone mobile:  
Phone other: +61425123456

Communications preferences  
Annual reports: Email  
Company information: Email  
Statements: Email  
Notice of meeting and proxy: Email

**Read-only users**  
There are currently no read-only users with access to this holding  
To invite read-only users to access this holding, enter their email address.  
Read only users will have login access to view this holding and will be copied in on selected email communications (such as payment statements) sent to you.

[View email preview](#)



# Advise your banking details for direct crediting

The platform allows you to have different bank details for direct crediting for each of your holdings.

From the home page, click on the holding. Click **edit** in the 'Payment instructions' section.

**Investor centre** Amber Pty Ltd Caroline Goldsmith

Account: Ms Caroline Goldsmith Investor number (SRN): 190017697757

[Show contact details summary](#)

Account details **Holdings** Tax details Notes and Documents

### Holdings

Expand	Issuer	Security class	Category	Balance
<input checked="" type="checkbox"/>	Amber Pty Ltd	Ordinary Shares	Issuer sponsored	12,500

**Holding statement** Date range: 07/07/2021 - 09/08/2021 [Download statement for this holding](#)

The first date is from the start of the day and so reflects the previous days closing price. For example, for a period of a calendar year select 1 January to 31 December.

**Payment instructions** [edit](#)

Dividend reinvestment plan: No Participation  
Bank account country: AUSTRALIA  
BSB: [Reveal](#)  
Account number: [Reveal](#)  
Account name: C M Goldsmith

**Contact details**

Contact name: CAROLINE GOLDSMITH  
Phone mobile:  
Phone other: +61425123456

**Communications preferences**

Annual reports: Email  
Company information: Email  
Statements: Email  
Notice of meeting and proxy: Email

**Read-only users**

There are currently no read-only users with access to this holding

To invite read-only users to access this holding, enter their email address.

Read only users will have login access to view this holding and will be copied in on selected email communications (such as payment statements) sent to you.

[View email preview](#)

**Note:** Some issuers require a recent bank statement to verify your banking details before processing updates to them. If so, you will be requested to upload your bank statement when editing the 'Payment instructions' section.



# Provide your country of residency and your Tax File Number

The platform allows you to have different tax details for each of your investors.

From the home page, click on a holding belonging to the investor. Go to the **Tax details** tab, then click **Submit/Update tax declaration**.

The screenshot shows the 'Investor centre' interface for 'Amber Pty Ltd' with the user 'Caroline Goldsmith'. A notification at the top states: 'A sufficiently quoted tax declaration for this holding has not been submitted. Click here to submit your tax declaration.' The account details for 'Ms Caroline Goldsmith' are shown, including the 'Investor number (SRN): 190017697757'. A navigation bar includes 'Account details', 'Tax details' (highlighted with a red box), and 'Notes and Documents'. The 'Tax details' section shows a 'Submit tax declaration' button (highlighted with a red box) and a warning: 'Tax declaration: not submitted' and 'Tax status: not sufficiently quoted. See this help centre article to learn more.' The tax type is 'Individual'. A table below shows the investor's tax details:

Investor	Tax number	Tax country
CAROLINE GOLDSMITH	-	-



# Generate holding statements

You can generate a holding statement for any period for any of your holdings.

From the home page, click on the holding. Select your date range and then click **Download statement for this holding**. If the investor has more than one holding, you can choose to include all holdings in the statement.

**Investor centre** Amber Pty Ltd Caroline Goldsmith

Update details  
Click here to update your bank, tax or address details

Holdings  
Messages  
Meetings  
Payments  
Tax statements  
Transactions  
Investor forms  
Contact

Account: Ms Caroline Goldsmith  
Investor number (SRN): I90017697757  
[Show contact details summary](#)

Account details **Holdings** Tax details Notes and Documents

Expand	Issuer	Security class	Category	Balance
<input type="checkbox"/>	Amber Pty Ltd	Ordinary Shares	Issuer sponsored	12,500

Holding statement [Date range: 07/07/2021 - 09/08/2021](#) [Download statement for this holding](#)

The first date is from the start of the day and so reflects the previous day's closing price. For example, for a period of a calendar year select 1 January to 31 December.

**Payment instructions** [edit](#)

Dividend reinvestment plan: No Participation  
Bank account country: AUSTRALIA  
BSB: [Reveal](#)  
Account number: [Reveal](#)  
Account name: C M Goldsmith

**Contact details**

Contact name: CAROLINE GOLDSMITH  
Phone mobile:  
Phone other: +61425123456

**Communications preferences**

Annual reports: Email  
Company information: Email  
Statements: Email  
Notice of meeting and proxy: Email

**Read-only users**

There are currently no read-only users with access to this holding

To invite read-only users to access this holding, enter their email address.

Read only users will have login access to view this holding and will be copied in on selected email communications (such as payment statements) sent to you.

[View email preview](#)



# Access your payment summaries

If you have been issued a dividend or distribution payment for one of your holdings, you will receive an email with your payment statement.

You can also access your payment statements from the Payments page at any time.

The screenshot shows the 'Investor centre' interface with the 'Payments' section selected in the left-hand navigation menu. The main content area displays a table titled 'Payments' with 4 results. The table columns are: Payment date, Security, Investor, Gross amount, Tax amount, Net, and Franking credit. Each row includes a document icon for downloading the statement.

Payment date	Security	Investor	Gross amount	Tax amount	Net	Franking credit	Statement
19 Jul 2022	Amber Pty Ltd Ordinary Shares	Ms Caroline Goldsmith	AUD 180.00	AUD 28.00	AUD 151.80	AUD 12.00	
2 Jul 2022	Vista Managed Funds Ordinary Units	Gamma Pty Ltd <Goldsmith Super Fund A/C>	AUD 600.00	AUD 0.00	AUD 600.00	AUD 60.00	
08 Mar 2022	Amber Pty Ltd Ordinary Shares	Ms Caroline Goldsmith	AUD 120.00	AUD 0.00	AUD 120.00	AUD 33.00	
5 Mar 2022	Vista Managed Funds Ordinary Units	Gamma Pty Ltd <Goldsmith Super Fund A/C>	AUD 582.00	AUD 96.44	AUD 485.56	AUD 60.00	

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**For more instructions on how  
to use Registry Direct:**

Visit [help.registrydirect.com.au](https://help.registrydirect.com.au)