

Five steps to investing with Milford for the first time

Step 1

Get informed

- Visit our website, read the Product Disclosure Statement
- Get advice with our Digital Advice Tool
- Call or email us if you have any questions

Step 2

Open an account

DAY 1

Complete our online application

DAY 2

We review your application

ALL OK?

- Yes - your account is opened
- No - we'll be in touch

DAY 3

We send you two emails

First a welcome email with:

- Your account number
- Bank details for your deposit

And a second email to provide access to the Milford Portal

Step 3

Investing your money

DAY 4

Make a bank transfer to us of at least \$1,000

DAY 5

We receive and process your payment

DAY 6

You will receive a deposit confirmation email from us

You can now view your investment in your Milford Portal

Step 4

Stay informed

- Log into the Milford Portal
- Download our mobile app
- Keep tabs on your investment

Step 5

You're on the Milford Investment journey. You can contact us at any time and track your investment in the Milford App or through the Milford Portal.



MILFORD
INVESTMENT FUNDS

Past performance is not a reliable indicator of future performance. Before investing you may wish to seek financial advice. Read the Milford Investment Funds Product Disclosure Statement as issued by Milford Funds Limited at milfordasset.com. For more information on our financial advice services visit milfordasset.com/getting-advice

0800 662 345
milfordasset.com