

# Caruso How To Guide

## Finish setting up your account

1. **Log in** to the **Investor Portal**.
2. You will need to add your residential address and phone number.
3. Click the **tick box** to consent to your information being checked and verified.
3. Click **“Complete now”**.

The screenshot shows the Mackersey Property Investor Portal. On the left, there is a sidebar with a 'Need help?' section containing 'Contact us' and 'Log out' links. The main content area is titled 'Finish setting up your account'. Below the title, there is a message: 'We just need a few bits of basic information to finish setting up your account. Complete the below to get access to the platform.' The form includes a 'Current residential address' field, a 'Phone' field with a dropdown menu showing '+64', and a checkbox for consent. The 'Complete now' button is highlighted with a red oval.

Mackersey Property

**Need help?**  
Contact us  
Log out

### Finish setting up your account

We just need a few bits of basic information to finish setting up your account. Complete the below to get access to the platform.

**Current residential address**

Can't find your address? [Enter address manually](#)

**Phone**

+64

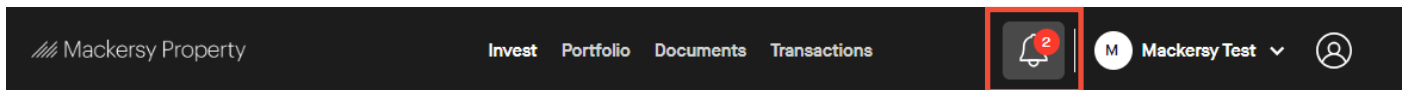
consent to my information being passed to and checked with the document issuer and any authorised third parties for the purpose of verifying my identity and address.

**Complete now**

### Notifications

Your notifications will be found on the navigation bar, shown as a “bell” symbol. The number next to it will show you how many notifications you have.

1. Click the **‘bell’** to view your notifications



## Finish setting up you account

2. Here you will see two actions to take in order to continue setting up your account

Check out our guides on how to 'Add an investing entity' and how to 'Verify your identity' on our website here: <https://www.mackersyproperty.co.nz/investor-portal-help>

The screenshot shows the top navigation bar with the Mackersy Property logo, menu items 'Invest', 'Portfolio', 'Documents', and 'Transactions', a notification bell with a red '2', and a profile icon. Below the navigation bar, there are two task cards. The first card is titled 'Add an investing entity' with a sub-header and a description: 'We need to know how you plan to invest. As an individual, as a company, as joint individuals, or as a trust?'. The second card is titled 'Verify your identity' with a sub-header and a description: 'For regulatory purposes we need to confirm your identity.' Both cards have a 'Complete now' button.

Once you have completed a task in the notifications tab, a new one will pop up in it's place.

Check out our guide on how to 'Add a bank account' on our website here: <https://www.mackersyproperty.co.nz/investor-portal-help>

The screenshot shows the top navigation bar with the Mackersy Property logo, menu items 'Invest', 'Portfolio', 'Documents', and 'Transactions', a notification bell with a red '2', and a profile icon labeled 'M Mackersy Test'. Below the navigation bar, there are two task cards. The first card is titled 'Verify your identity' with a sub-header and a description: 'For regulatory purposes we need to confirm your identity.' The second card is titled 'Add bank account' with a sub-header and a description: 'We need the bank details for your investing entity so we can pay you your share of fund distributions.' Both cards have a 'Complete now' button.