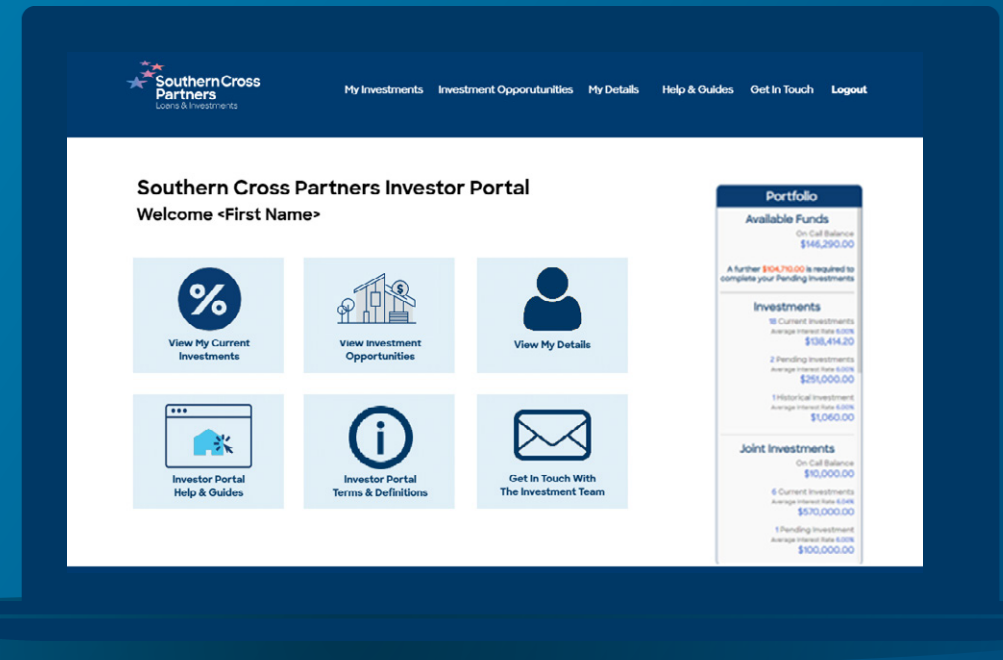




# Investor portal 'how to' guide



# How to exit an investment by selling it



1

Log into the investor portal with your **Client ID** and **password**.

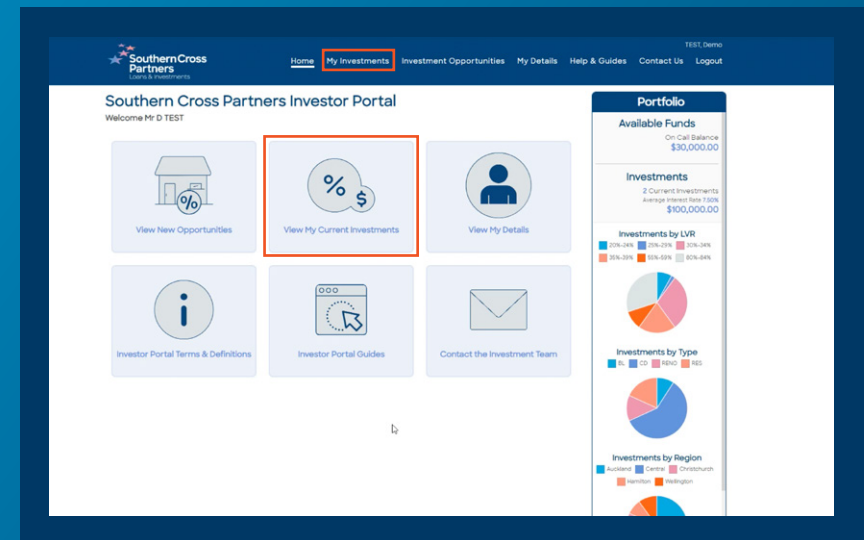
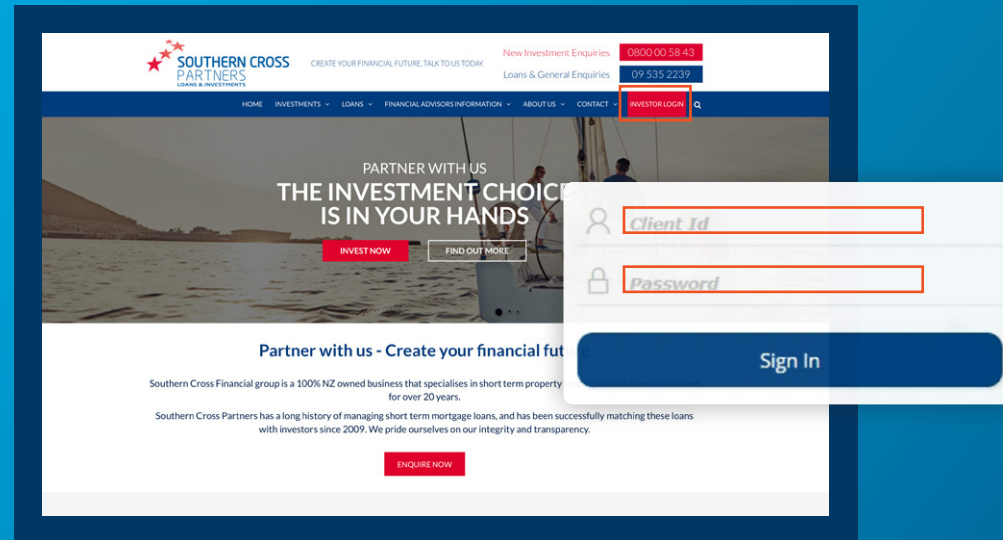
Click **Sign In**.

2

Navigate to the **My Investments** section.

You can do this by clicking the **View My Current Investments** tile.

Or by clicking **My Investments** in the navigation bar along the top of the portal page.



3

All your current investments are listed in the **Current** section.

Ensure you have selected this section by clicking on **Current**.

Find the investment you wish to sell and click the **Details** button on the right hand side of the investment table.

It will take you to a new window.

**My Investments** Filter

**CURRENT** PENDING HISTORICAL ON CALL STATEMENTS

Investment	Description	Investment Date	Value	Rate	Anticipated Maturity	Status
<b>Owned</b>						
40037	Two adjoining sites, with dwellings, Papatoetoe	09/08/2022	50,000.00	6.35%	30/06/2023	Opportunity
11937	Erica Pabst Way Island Bay Wellington City	10/09/2021	272,600.00	6.35%	10/08/2022	
<b>Associated</b>						
40041	Williamson Avenue, Belmont (The Demo Family Trust)	24/05/2022	200,000.00	7.50%	17/02/2023	For Sale (Pending)
40017	Hamurana Place, Te Atatu Peninsula, Auckland (The Demo Family Trust)	11/05/2022	300,000.00	7.25%	21/04/2023	
12050	Pempsey Street Silverstream Upper Hutt (The Demo Family Trust)	15/03/2022	100,000.00	6.50%	11/09/2023	Opportunity
11865	Richards Avenue Forrest Hill - North Shore (The Demo Family Trust)	04/06/2021	150,000.00	7.00%	25/11/2022	
11879	Wairarapa Terraces/Merivale/Christchurch (The Demo Family Trust)	04/06/2021	150,000.00	6.49%	01/01/2023	

**Portfolio**

**Available Funds**  
On Call Balance \$50,000.00

**Investments**  
2 Current Investments  
Average Interest Rate 6.35%  
\$322,600.00

**Associated Investments**  
On Call Balance \$100,000.00  
5 Current Investments  
Average Interest Rate 7.05%  
\$900,000.00  
3 Historical Investments  
Average Interest Rate 5.45%  
\$600,000.00

**Investments by LVR**  
40%-44% 45%-49% 55%-59%  
60%-64% Over 100%

**My Investments** Filter

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**Investments by LVR**  
40%-44% 45%-49% 55%-59%  
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## 4

In this window you'll see the details of your investment, including:

- Investment date
- Value of your investment
- Your interest rate

Click the white **Sell Investment** button.

The screenshot shows the investment details for 'Williamson Avenue, Belmont' (ID 40041). The page includes a navigation bar with 'Home', 'My Investments', 'Investment Opportunities', 'My Details', 'Help & Guides', 'Contact Us', and 'Logout'. The user is identified as 'Demo, Mr'. The investment details are as follows:

- Name:** The Demo Family Trust
- Investment Date:** Tuesday, May 24, 2022
- Investment:** \$200,000.00
- Total Interest:** \$1,486.85 (Gross \$2,219.18 less RWT \$732.33)
- Total Interest Paid:** \$1,486.85
- Balance:** \$200,000.00
- Maturity (anticipated):** Friday, February 17, 2023 (This date may be subject to change.)
- Interest Rate:** 7.50%
- Interest Payment:** Paid Monthly
- Repayment option:** Retain in On Call account for re-investment

A 'Sell Investment' button is highlighted with a red box. Below the details are tabs for 'TRANSACTIONS' and 'DOCUMENTS'. The 'TRANSACTIONS' tab is active, showing a table of transactions:

Date	Notes	Gross Value	W/Tax	Value	Balance
16/07/2022	Nominees - Deposit Interest Paid Out			(826.03)	200,000.00
16/07/2022	Interest from 17/06/2022 to 16/07/2022 (30 days) at 7.5%	1,232.88	406.85	826.03	200,826.03
16/06/2022	Nominees - Deposit Interest Paid Out			(660.82)	200,000.00
16/06/2022	Interest from 24/05/2022 to 16/06/2022 (24 days) at 7.5%	986.30	325.48	660.82	200,660.82

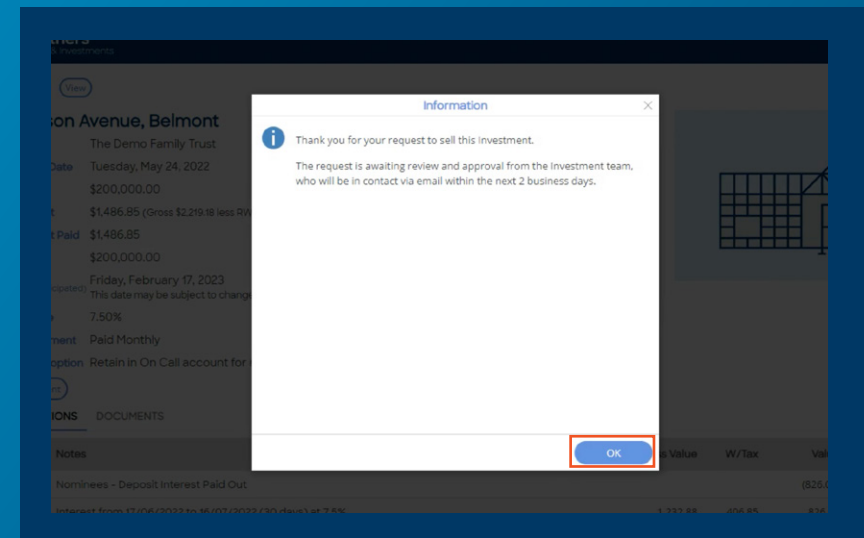
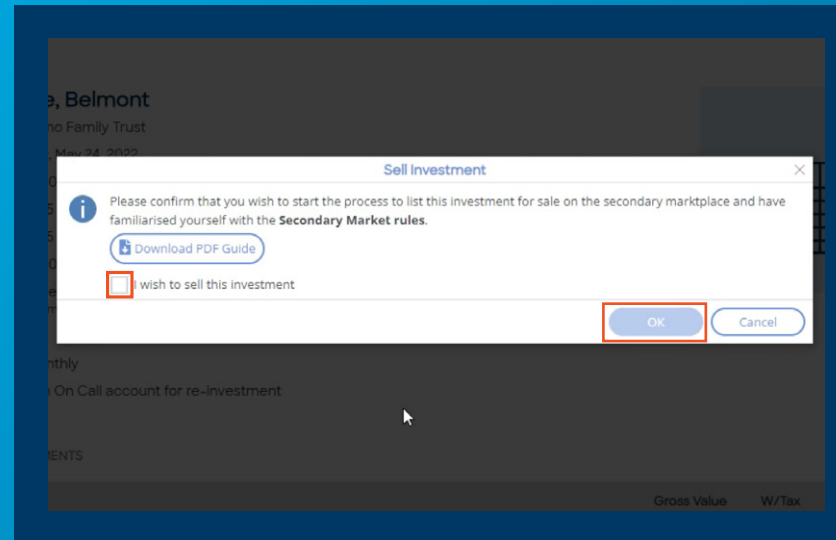
## 5

A pop out box will appear asking to confirm your desire to sell.

To confirm this action, tick the box next to **'I wish to sell this investment'**. Then click **OK**.

Another box will appear to confirm that your request to sell your investment is being assessed by the SCP team.

Click **OK** to return to the Investment's Details section.



## 6

Click the **Back** button to return to your list of current investments.

You will now see your investment is **For Sale (Pending)** under the **Status** column.

Once a secondary market request is approved, this will change to **For Sale**, and your investment will be live on the portal ready to be taken by another investor.

**Southern Cross Partners**  
Loans & Investments

Home My Investments Investment Opportunities My Details Help & Guides Contact Us Logout

40041 View ← Back

**Williamson Avenue, Belmont**

Name The Demo Family Trust

Investment Date Tuesday, May 24, 2022

Investment \$200,000.00

Total Interest \$1,486.85 (Gross \$2,219.18 less RWT \$732.33)

Total Interest Paid \$1,486.85

Balance \$200,000.00

Maturity (anticipated) Friday, February 17, 2023  
This date may be subject to change.

Interest Rate 7.50%

Interest Payment Paid Monthly

Repayment option Retain in On Call account for re-investment

[Sell Investment](#)

**TRANSACTIONS** DOCUMENTS

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**Southern Cross Partners**  
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Home My Investments Investment Opportunities My Details

**My Investments** Filter

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## Can I talk to a real person?

If you have any questions, comments, or feedback, you can call us or send us an email.

0800 00 58 43

[investments@scpartners.co.nz](mailto:investments@scpartners.co.nz)

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