

o2h Venture user guide

The Investor Onboarding Mobile Application is a ready to go option for the new investors to easily register and come onboard for investing into EIS and S/EIS funds.

Investors can easily get themselves registered by following the below steps:

1. Login to <https://o2h.com/ventures>
2. Click on “Click here to find out more” to know the Fund Overview
3. Scroll down and click on “Apply Now” after reading the Fund Overview
4. Choose the investor type that describes you the best.
5. Read and agree to the Self Certification. Click on “Sign by clicking here” to proceed to next page.
6. You land-up on our Register page.
7. Please fill in the required details. And click on Register.
8. Congratulations! You have successfully registered with us.

You will receive an email confirming the same on your

ios users can download the app via: <https://apps.apple.com/us/app/o2h-ventures/id1470570134>

Once you have downloaded and installed follow the below steps to login:

1. Open the app and enter the email address and password which is used while registering.
2. In case you forget password:
 - a. You can always reset your password by clicking on ‘Forget password’ and entering the email address registered with us.
 - b. You shall receive an email to change your password. Following which you can successfully change your password.
3. After reading the Investment Portal click on the camera icon to scan the driving license or you can also choose to feed the data manually.

After logging, the investor portal has four steps:

1. Personal Details –
 - a. Enter your ‘Name’, ‘Birthday’, ‘Birth Country’ and ‘Driving License Number’. Click on the ‘forward arrow’, found at the bottom right of the page to Proceed.
 - b. In the next page please add your ‘City of Birth’, ‘Passport Number’, ‘Residence Country’ and ‘TIN Number’.
 - c. This completes your personal detail. Click on the ‘forward arrow’, found at the bottom right of the page to Proceed to add Contact Details.
2. Contact Details –

- a. Your address will be fetched and displayed from the scanned driving license. if you did not choose to scan driving license, you need to add the address manually.
- b. You can also add multiple addresses and telephone types with the add options given on the screen.

3. Suitability –

- a. Here you can check your suitability before investing to the fund.
- b. Please respond the questions asked under Investment Experience to the best of your knowledge for better Investment Idea.
- c. Click on the ‘forward arrow ‘, found at the bottom right of the page to Proceed.
- d. Kindly read and understand all the Investment Objectives and Risks.
- e. Click on the ‘forward arrow ‘, found at the bottom right of the page to proceed towards Investment and Declaration.

4. Investment-

- a. The final step of the investment portal is ‘Investment and Declaration’.
- b. Please fill the below asked details i.e., ‘Bank Account Name’, ‘Net Subscription’, ‘Bank Account Number’, ‘Sort Number’ and ‘Building Society Roll Number’.
- c. Click on the ‘forward arrow ‘, found at the bottom right of the page to proceed towards Investment and Declaration.

Congratulations you have successfully submitted your subscription request. The “Thank You “page confirms the same.

You can click on “Take a Screenshot” for easy capturing the data.

After you have logged-In, you can Top-up the investment subscription from the Home page. Kindly follow the below steps to top-up the Investment subscription

1. Enter the top-up amount in GBP (Please note that Topup the minimum amount is 25000 GBP)
2. Click on “Submit” to submit the top-up the Investment.

Congratulations your Investment subscription is been done. The “Thank You “page confirms the same.

You can click on “Take a Screenshot” for easy capturing the data.

For any further queries you can always reach us through email and phone by clicking on the contact icon, present at the top-right corner of the Home page.

