Hepburn Energy

MEMBER ONLINE PORTAL USER GUIDE



www.hepburnenergy.coop/membership/



Member online portal user guide

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www.hepburnenergy.coop/membership/

<u>@hepburnenergy</u>



Hepburn Energy Online Portal

The Hepburn Energy Online Portal is hosted by Syndex and managed by Hepburn Energy staff. It allows members to view and make some changes to their shareholding membership and access investment statements. The portal will have future upgrades. Currently, members can view and edit their contact details. Viewing and editing bank account details, tax file number details and dividend plan details are currently unavailable for selfservice but can be edited by Hepbrun Energy staff. Contact <u>community@hepburnenergy.coop</u> with any questions and stay

tuned to the Hepburn Energy e-news for future portal upgrade announcements.

Who is Syndex?

- Syndex is a privately owned, online investment platform.
- Syndex maintains the platform and member portal. Hepburn Energy manages the registry and the data in the portal.
- If you have any questions about the portal, your shareholding or membership please contact the Hepburn Energy Community Officer, not the Syndex team.
- Members can access the Syndex-powered portal through most standard browsers on most devices and there are no fees for activating and using your account.
- The Syndex software runs on secure infrastructure that follows rigorous international standards, such as ISO 27017 for cloud security and ISO 27701 for privacy information.
- If you would like to know more about Syndex, please visit their <u>website</u> and explore the <u>Help Centre</u>

Please note; as a co-operative, we do not discuss share value. We have a fixed share price of \$1.10 (share price \$1 plus \$0.10 premium). The premium was applied from 1 July 2011 and is still valid. Previous to this the share price was \$1.00 (back to commencement in 2009). The price you paid will depend on when and how you purchased your shares.

Any details on the Syndex portal that use the terms; value or price, may not be the price at which you acquired your investment and are NOT an indication of share value. For valuation of shareholdings refer to Hepburn Energy Annual reports available on the portal or <u>https://www.hepburnenergy.coop/membership/</u>. You may also wish to seek independent financial advice.



1. How to access the Online Portal

Members must have an email address listed on our registry to access our online portal. The email address provided to Hepburn Energy will be used for your login.

Already have a Syndex account?

• Great, you will be able to view your investment details when you next log in to your Syndex account.

Please note, due to having other investments on the Syndex platform your investor portal will be branded as Syndex and not Hepburn Energy. However, all other functions apply.

Are you new to Syndex?

• Check your email.

You will receive an email with the subject line "**Activate My Account**" from services@syndex.exchange, which will look like this:

• Click the email link

The link will open the Syndex Investor Portal where you will be taken through a simple setup process:

Step 1

Click on the "Activate your Account" link.

Step 2

Choose a password.

Your password must be at least eight (8) characters long and include both letters and numbers. Please choose a secure, unique password and don't share your login details with anyone

Step 3

Read and accept the **Syndex Terms and Conditions** and complete the **Declaration**. All your key information is already entered so you will only need to check what's there.

syndex.						
Dear Oscar,						
Welcome to Syndex Demo Group Limited is delighted to invite you to activate your new portal account. This is managed on Syndex, a secure, cloud-based platform that will provide you with all you need to view your holdings with Demo Group Limited. Communications relating to your investments will be conducted via our online portal. Once your portal account has been activated you can login here.						
	How to activate your account					
Simply click "Activate My Acco password, and get the process	unt" below to confirm your email a underway.	address, create your account				
	Activate my Account					
Your Demo Group Limited port provide you with a contempora To access your holdings with D conditions for using the portal	al powered by Syndex has been rry digital environment in which yo Demo Group Limited we'll ask you and holding your data on the Syn	designed specifically to ou can view your holdings. I to accept the terms and dex platform.				
There is no fee for activating o	r using your account.					
For queries relating to any of y Group Limited phone 027 623	our investments, please contact 5837 or email jemima.crawford@	Jemima Crawford at Demo demogroup.com.				
For queries relating to your por	rtal, please contact Syndex.					
We look forward to helping you	ı view your Demo Group Limited	holdings.				
The Team at Syndex E support@syndex.exchange						
	Syndex Portal — Key Features					
Once your registration is comp documents specific to Demo G	lete, you will be able to access ye roup Limited.	our holdings, income and view				
Here is a summary of the key f and information hovers to help	features on your portal. We have you navigate your way around.	also provided help buttons				
My Investments View your current holdings and transactions.	Income View and export your income and distribution records for a given period.	Performance Shows detailed reports and clear comparisons of your investments' performances.				
		-				
Dashboard	Messages	Documents				
An overview of your investments, latest messages and notifications.	Messages and attachments sent via the Syndex communications groups to all investors.	All documents specific to your investing entity, sent to you by your manager via Syndex.				
Please do not reply to this en	nail. To get in touch please refer to our contact deta	is at the bottom of this page.				
6 Sy	syndex.	rved				
Level 1, 1-5 Link Road	Zefland NSW 2017 Australia support@syndex.exi	change Privacy Policy				
ndition	s and co	mplete				



2. How to log into the Online Portal

Once your account is activated, you can log in directly at any time by clicking the **member login button** on the top right corner of our website: **www.hepburnenergy.coop**

MAKE THE SHIFT TO 100% RENE	WABLE ENERGY
Hepburn Energy	
Become a shifter, make the switch to 1009 renewable energy from Hepburn Energy. It's easier than you think REGISTER TODAY	► Hepburn Login to Syndex We come to the Syndex platform. Please login to access your account. Email Password Login Login Engot your password?

When you log in to the portal for the first time you will be prompted to check your details. Please use this opportunity to check that your details are correct and make any changes necessary. You can find out more about updating your details in section 4 of this booklet.



3. Navigating the Online Portal

There are 3 main tabs on the portal home page: **Dashboard**, **My Investments & Communications**.

Dashboard

When you first log into the Hepburn Energy online portal you will view the portal dashboard. This dashboard provides an overview of your current investments with Hepburn Energy. You can select different tab categories (account, manager, type and currency) to view filtered details of your portfolio.

Hepburn Energy	🗱 Dashboard 🛛 My Investments 🖓 Communications	✓ ② _{Gale}
Market Activity 💿 🗸	22 Aug 2023 Hello Gale	~
Live Markets O 🗸	Account Manager Type Currency Messages	~
	Current Quantity ℗ Gale Gusto 100	
	View Portfolio	
		Ça
		0
Powered by Syndex. © Syndex Pty Ltd - All Rights Reserved	About Syndex Contact Us Privacy Policy Disp	outes Account Holder Rules

On the dashboard, there are also quick links to the left and right of the screen.

Market Activity and **Live Markets** are not activated on the Hepburn Energy Online Portal

Notifications

Any notifications relating to Hepburn Energy shareholdings are displayed in this panel. Click on a notification for more detail. All tasks associated with these notifications are also delivered to you via email.

Messages

All important messages you receive from Hepburn Energy will be sent to you via email (or post where 'mail only' has been chosen). Occasionally messages through the online portal will be used here for additional reminders.



My Investments

You can view further details of your Hepburn Energy shareholding by clicking the **My Investments** tab or the **View Portfolio** button on the Dashboard Page.

The historical details of your shareholding viewable on the online platform are limited to the start date of our registry with Syndex - 1 February 2023. For details of further historical transactions please contact

community@hepburnenergy.coop

Hepburn Energy does not currently have **performance** data to display



Your **Portfolio** details your current holdings. Click the arrow to the left of a row to expand all transactions for that investment.

The **Transactions tab** shows a full record of your current and historical investments (since 1 Feb 2023). This includes when newly issued shares, share transfers and redemptions. Here you will find details on any Member Share Buy Back you have participated in. The **Income tab** displays a record of distributions and dividends paid for your investments. This tab does not reflect whether a Dividend Reinvestment or Donation Plan has been activated for the membership and displays the monetary amount of the dividend only.



Issue Detail Page

On the portfolio tab, you can click **Actions** to view the **Issue Detail** page:

LIH	lenhurn							
- Mie	nergy				👪 Dash	board	J.	Ay Investments
№ Yo	1y Investment	S nt holdings						
	Portfolio	Transaction	S	Income	Performance			
		Account	Ŧ	Issue =	Manager 🔶 🤋	Asset Class	Ŧ	Issue Type
	> Actions	Gale Gusto		Hepburn Energy Ord Shares	Hepburn Community Wind Park Co- operative Ltd	Ordinary Sha	ares (Co-operative
	4							

Here you will find more details on the Hepburn Energy shares that you hold, including important co-operative documents, history and contact details. Click through the tabs to view all the information:

Н	Hepburn Energy	👪 Das	hboard (My Investments	Communications	✓ ② Gale
	Hepburn Commun Hepburn Commun Issue Type Establishment Date Offer End Date Financial Year End	ergy Ord Shares ity Wind Park Co-operative Ltd Co-operative Total Units/Shares 1 Jul 2008 Minimum Investm Open Winimum Investm 30 Jun 2024	ent Quantity ent Value Ç	RETAIL 9.241,322 100 Unit/Share(s) \$ 100.00 AUD		
	Overview	Gallery Documents	Trade History	Contact		
	Hepburn Energy (former battery co-operative. Th only to produce renewal co-design and own gene Hepburn Energy is still o directly from the co-ope can also be purchased fr	y Hepbum Wind) has been powering change in energy and re farm is located at Leonards Hill, Dja Dja Wurrung Country, al energy but to need our community's social and environ ration assets while advocating for the broader energy market been for new member shareholders to join our community ente ative is \$1.10 (share price \$1 plus \$0.10 premium). The premi om existing members who wish to sell as a share transfer, whe	newables for over a de bout 100km northwest ntal ambitions, build re and policy change. erprise. Locals can buy um was applied from 1 re the price is negotiate	cade. Starting as Australia's fir of Melbourne and hosts two 2 silience and contribute to wide in for a minimum of 100 share July 2011 and is still valid at 31 ed between the buyer and selit	t community-owned wind farm, and now working on being the first hybrid wind, solar and 05MW wind turbines. With almost 2000 shareholding members, the co-operative exists not r system change. We implement principles of energy democracy, enabling our community to s and non-locals can join up with 1000 shares. The current share price when purchasing 2/6/2023. Previous to this the share price was \$1.00 (back to commencement in 2009). Shares sr.	0



Communications

Through the communications tab, you can view any Hepburn Energy messages or your documents that have been generated by the Syndex platform such as dividend or holding statements.

Messages

All important messages you receive from Hepburn Energy will be sent to you via email (or post where 'mail only' is selected). Occasionally messages through the online portal will be used here for additional reminders.

Documents

Here you can find documents specific to your Hepburn Energy investments, for example, dividend statements or end-of-financial-year statements. These documents have been generated and sent via the Syndex platform and were sent to you originally via email. Email attachments delivered by other means are not shown.

Use the preset filters down the left-hand side, or the date filters or search across the top, to find specific documents.

		👪 Dashboard	My Investments	🛱 Communicat	ions			
My Documents All distributed documents for the given period				Messages Documents	Ð			
Documents By Manager Hepburn Community Wind Park Co- operative Ltd		6 Months	12 Months 2 Years				_	
By Investment Account		Account	Name	Manag	jer	Issue	Date ↓	
Gale Gusto	÷	Gale Gusto	TransactionAndIncome - Gale Gusto - 20230630	7			29 Aug 2023, 9:41:36 am	
Ву Туре	۲	Gale Gusto	Holding Movement Statement - Gale Gusto	٨			3 Jul 2023, 1:25:05 pm	1
Statement - Distribution	۲	Gale Gusto	DividendSummary 1099001234567	Hepburi Vind Pa operativ	n Community ark Co- /e Ltd	Hepburn Energy Ord Shares	18 May 2023, 10:20:47 am	•

You can watch a tour of the **generic** Syndex portal <u>here</u>. Note: This will have differences from the Hepburn Energy Online Portal. For questions about our portal contact community@hepburnenergy.coop



4. Viewing & Updating Your Details

Read on for instructions on viewing and updating your details If you have any questions please contact **community@hepburnenergy.coop**

Viewing & Editing your details

You can view and update some of your personal information through the user menu. Follow the steps bellow:

Step 1

Click the down arrow next to your name in the top right corner to expand the **user menu**. Select **Investment Accounts** from the drop-down.

Dashboard	My Investments	🖓 Communicati	ons	∽ ⊗ _{Gale}
22 Aug 2023	1		Notifications	Preferences
Hello Ga	le			Investment Aq_ounts
Account	Manager Type	Currency	Messages	Reset Password
Current Quantity 🕐				About Syndex
Gale Gusto				Contact Us
100				Logout
	Vie	w Portfolio		

Step 2

Select **Edit** next to the account name that you want to view and/or manage the details of.

ł	Hepburn Energy		Dashboard	My Investments	💬 Communications	✓ ② _{Gale}
	Accounts that you own or have authority t	o manage are listed below. Sin	nply click edit to view and	d update any account. The Ac	count Alert provides a high level overview of actions required.	
	Account Name	Туре	Status	Date Created	Actions	
	Gale Gusto	Individual	Approved	13 Jul 2023, 7:05:50 pm	All up to date. No action required.	Edit
						0



Step 3

Once editing or viewing an account, navigate using the tabs at the top of the page, the sidebar, or the Next button at the bottom. The sidebar has icons indicating which sections need your review, as well as showing the percentage of overall completeness via the Account Setup Status at its top.

Н	Hepburn Energy			Dashboard	团 My Investments	: 🖓 Communications		✓ ② _{Gale}
	Gale Gusto Individual		Account Details To get started please e	enter your personal inform	nation and contact details. Ye	ou can save and return at anytime		
	Registration		Account Details	Relationships Identity Ve	erification Wholesale Cert	ification Supporting Documents	Review and Declaration	
	84%	-	Title 🗸	First Name Gale		Middle Name Middle Name	Last Name Gusto	
	Account Details	O		Preferred Name				
	Relationships	Ø		Preferred Name				
	Identity Verification	\odot						
	Wholesale Certification	Ø		Date of Birth 14/12/1981		Country of Birth	Country of Citizenship	•
	Supporting Documents	۲						_
	Review and Declaration	Ø		Current Residency Australia	•	Resident Visa No. Resident Visa No.		
	Last updated: 14 Aug 2023, 2:02:03 pm			Email windyhill@hotmail.com	n	Mobile 0457 111 111	Home Phone Home Phone	
			🗌 I am a S	ole Trader				
			Address 🔊					*

You can update any details available here, by typing in the fields and then click **Save & Exit** OR **Save & Next** to action. Please see the following boxes for further details on each tab:



Account Details

This tab holds basic membership identity and contact information, click on the fields to modify the content.

For **individual memberships**, this includes details such as preferred name, date of birth, email address, phone number, and postal address.

For **organisation memberships** (such as super funds, trusts, companies, joints, and partnerships), this includes entity numbers, residential and postal addresses.

To **update an account name** you will be required to provide document proof of the change. Do to this make the name change in the Account Details tab and then upload your document to the Supporting Documents section. This will then go to our administrative staff for approval and you will be notified of the change.

Some account details are only available to be added during the initial setup of a new account. If any details were added incorrectly at setup, and you would like them changed, please contact <u>community@hepburnnenergy.coop</u>.



Relationships

Here you can add related individuals and organisations to your membership by clicking the **Add** button in the top right corner.

For **individual memberships**- You have the option to add power of attorney or view individuals who are authorised to act on that person's behalf, have permission to view that person's personal account details, or are a primary contact for that person's membership.

For **organisation memberships**- You can view and add related individuals and organisations. The relationship types depend on the organisation's entity type (eg Company - directors, Trusts - trustees & beneficiaries, Joint memberships - joint individuals).

You can add new relationships at any time. However, amending and removing relationships is currently only available during the initial setup of a new account, if you need something amended please contact community@hepburnnenergy.coop. You can add new relationships at any time.

Supporting Documents

This tab allows you to upload any supporting documentation relating to the verification of your account. There is no need to upload documents you have already provided to Hepburn Energy unless something has changed.

Review and Declaration

Tick that you confirm your information is true and correct where required and click submit to finalise. Upon submission your registration status should reach 100%, if there are details missing or you require assistance please contact community@hepburnenergy.coop



Future Portal Upgrades

We anticipate the following upgrades to the Hepburn Energy Online Portal in the future

Residential Address

Currently, the Hepburn Energy Online Portal does not have this feature. Via the portal, you can update your postal address but if require an update to your residential address please contact community@hepburnenergy.coop or phone (03) 53486760. Please provide your full membership/shareholding name, existing residential address and phone number as stipulated on the Hepburn Energy registry and we will amend your membership details for you.

Bank Account details, Tax details & Dividend Investment Plans

Currently, the Hepburn Energy Online Portal does not have these features. If you have any questions or require an update to your nominated bank account, tax file number or dividend reinvestment plan please contact <u>community@hepburnenergy.coop</u> or phone (03) 53486760.

Please provide your full membership/shareholding name, existing residential address and phone number as stipulated on the Hepburn Energy registry and we will amend your membership details for you.



📕 Hepburn

Activation email not received

- First, check your junk/spam folder. If it's not there, please contact community@hepburnnenergy.coop and we'll arrange for the email to be re-sent.
- Add services@syndex.exchange to your email contacts to help prevent the email from being put into the junk folder.

Resetting your password

You can reset your password within the Hepburn Energy online portal by clicking the down arrow next to your name in the top right-hand to expand the user menu. Select Reset Password from the drop-down. Provide your email and click submit, to receive the reset password link to your email and follow the prompts to reset.

# Dashboard	네 My Investments	🖵 Communicati	ons		∧ ⊗ _{Gale}
^{22 Aug 2023} Hello Ga	le		Notifications	Preferences	5
Account	Manager Type	Currency	Messages	Reset Passv	Accounts
Current Quantity 🕲 Gale Gusto				About Sync	lex
100				Logout	
	Viev	v Portfolio			

Forgot your password?

On the <u>login page</u>, select Forgot your password and follow the prompts to reset.

Hepburn Energy
Login to Syndex
Welcome to the Syndex platform. Please login to access your account.
Email
Password
Forgot your password /

For any further queries relating to your shareholding

Please contact community@hepburnenergy.coop or phone (03) 53486760.

Online Portal Quick-Guide

This page offers a quick guide to using the Hepburn Energy Online Portal.

Log In

Once your account is activated, you can log in directly at any time by clicking the **member login button** on the top right corner of our website: <u>www.hepburnenergy.coop</u>

View & Edit your Details

Shareholding

L Hepburn

Energy

View your shareholding details by exploring the main **Dashboard** & the **My**

Investments tabs

Statements

View your Hepburn Energy Statements by exploring **Communications>Documents**

Personal Details

View your Personal Details by selecting

Investment Accounts from the dropdown

next to your name.

Then select **Edit**, next to the correct account

You can then update any details available by typing in the fields and then click **Save & Exit** OR **Save & Next**.

If you need to update your name you will need to upload a document of the proof of the change in the supporting documents section. To update your residential address please email community@hepburnenergy.coop

Bank Account & Dividend Plans

Currently, the Hepburn Energy Online Portal does not have these features. If you have any questions or require an update to your nominated bank account, tax file number or dividend reinvestment plan please contact community@hepburnenergy.coop

Forgot your password?

On the login page, select Forgot your password? and follow the prompts to reset.

If you have any more questions, please take a look at the complete **Hepburn Energy Online Portal User Guide**, contact community@hepburnenergy.coop or call (03) 53486760.



33 Dashboard

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Currency

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Mv Investments

Hello Gale

Messages

Account Manager Type Curre

Communications

Documents 🖑







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