

ONLINE SERVICES FROM DAVY SELECT

We would like to offer you the opportunity to register for the following complimentary online services:

1. ACCESS YOUR DAVY SELECT ACCOUNT ONLINE:



- View your portfolio valuation and cash holdings online anytime
- Access up-to-date reports of your holdings including the percentage gain or loss
- View your transaction, income and deposit statements online
- Set up Price Alerts to your email
- Set up Stock Watch favourites
- View Davy Research across a range of sectors, including Industrials, Food, Beverage & Pharma, Transport & Leisure, Financials and many more
- View Independent Morningstar Research™

2. RECEIVE YOUR DAVY SELECT ACCOUNT CORRESPONDENCE ONLINE:



You also have the option to receive certain Davy Select Account correspondence online.

This will replace paper copies, which means you will **no longer receive these documents by post.**

- Access your Contract Notes, Annual Nominee Statements and Annual Tax Packs online
- Correspondence available to view any time, 24 hours a day, 365 days a year
- Email alert when new correspondence becomes available to view online in your account.
- A secure online repository for your account correspondence going forward

If you already have access to view your account online, you can also amend your correspondence preferences as follows:

1. Visit **www.davyselect.ie**
2. Log in using the username and password provided by Davy Select.
3. Add the additional code sent to the mobile phone associated with your account
4. Click on the **Accounts** tab
5. Click on **My Personal Details** in the sub menu and select **Register for Online Correspondence**

If you don't have Davy Select Online Account Access, please complete the form below, select the services you require and return to: Davy Select, Davy, 49 Dawson Street, Dublin 2.

Important Information:

By registering for any of the Online Services from Davy Select, there is no change to the way you place orders online or by phone with the Davy Select Dealing Desk. Davy Select Telephone Trading Account clients should be aware that all orders must still be placed over the telephone to the Davy Select Dealing Desk and cannot be placed online.

By registering to view your Davy Select Account online, you will still receive your account correspondence by post unless you choose to avail of this option in the registration form. Before registering to receive correspondence online, please read the Terms of Service contained herein.

Once we receive your completed registration form, we will send you a username and password by post within two weeks. There is no additional cost for choosing to view your account online or to avail of Online Correspondence.



If you have any queries please contact us at **01 614 890** or email us at **davyselect@davy.ie**

TERMS OF SERVICE - ACCOUNT CORRESPONDENCE ONLINE

Before registering for our account correspondence online service, please read this agreement carefully as it governs your use of the service. It is important that you read our general terms and conditions for full information on your Davy reports which are available on www.davysselect.ie.

Our account correspondence online service ('service') is available to you so that you may access your Davy Select reports online by logging on to a secure area of the Davy Select website. All reports will be available within the same timeframes as they are currently provided to you. Where you sign up to receive your Account Correspondence Online you will not receive paper copies of the documentation provided to you via the online service. If you wish to receive any documents in paper copy please contact us and we will send these to you by post.

Your registration for this service

You should be aware that by registering for this service you are electing to access reports for your Davy Select account(s) online going forward. We have a regulatory obligation to provide you with certain reports, dependent upon your service level. If you are a telephone share dealing or online client and we execute an order for you, we have an obligation to provide you with information about the order. We currently do this by sending you a contract note no later than close of business on the business day after the trade was executed. Where a third party provides a contract note, we will send it to you by close of business on the day following receipt from the third party. If you are a nominee client, we will confirm your cash and holdings to you at least once a year by way of a nominee statement, unless this information has been provided to you in another report, such as your Portfolio Valuation. Further information about these reports is provided in our general terms and conditions, it is therefore important that you also refer to these for full information.

What is included in this service?

Currently, contract notes, valuations, private equity, property reports, nominee statements, tax packs, statements of chargeable gains and guide to the tax treatment of Davy investments may be accessed online. It is important that you are aware that upon registering for this service you will no longer receive paper copies. Dependent upon your service level, other reports will become available to this service in the future. We will send you prior notification advising you of each addition at least 30 days prior to launch as the online version of each report will replace the paper copies we currently provide.

Accessing online reports

This service is available to clients who have been provided with a username and password in order to access a secure area of the Davy Select website, you may use these details to access your reports safely and securely. The right of access to this service (through the provision of a username and password, or any alternative means of authentication which we might use in addition to or in lieu thereof) provided to you may not be assigned, licensed or otherwise transferred by you to any other person under any circumstances. It is important that you do not disclose your access details to anyone and you must take all reasonable care to prevent unauthorised or fraudulent use of your access details. If you know or suspect that someone has obtained your access details you must inform us immediately.

Using the service

When a report becomes available for you to access online, we will send you an email or SMS text message alert (depending on your service level) within the following timeframes:

- Contract notes: by the close of business on the day following a purchase or sale on your account as confirmation that the full contract note is available online.
- Time frames applicable to other reports will be confirmed to you prior to these becoming available online.

Upon receipt of the alert you can access your reports safely and securely. Reports will be available online to you as a client of Davy for a period of two years following the date of your last transaction.

Important notes

As a result of high internet traffic, transmission problems, systems capacity limitations, and other problems, you may at times experience difficulty accessing the website or communicating with Davy through the internet or other electronic and wireless services. Any computer system or other electronic device, whether it is yours, an internet service provider's or Davy's, can experience unanticipated outages or slowdowns, or have capacity limitations. Davy, its directors, officers and employees do not accept any liability for any loss or damage arising therefrom. In the event that access to the service is disrupted for technical reasons we will post a notice to that effect on the website as soon as reasonably practicable. If we declare the service unavailable in this way, and you wish to access a report during the outage, we will provide you with a paper copy of the report. A schedule of our fees and charges is available on www.davyselect.ie. These terms do not vary our general terms and conditions and in the event that these terms conflict with our general terms and conditions, these terms will prevail.

Data Protection

J&E Davy, trading as Davy, is a data controller under the Data Protection Acts 1988 and 2003 and your personal data will be processed in accordance with Davy's obligations under these Acts. Your email address and mobile number will only be processed in accordance with the purposes for which it was collected.

J & E Davy, trading as Davy, is regulated by the Central Bank of Ireland. Davy is a member of the Irish Stock Exchange, the London Stock Exchange and Euronext. In the UK, Davy is authorised by the Central Bank of Ireland and authorised and subject to limited regulation by the Financial Conduct Authority. Details about the extent of our authorisation and regulation by the Financial Conduct Authority are available from us on request.