

# NEXTCROWD INVESTOR JOURNEY GUIDE TO OPENING OR TRANSFERING AN ISA

## ONBOARDING STEPS



### Step 1:

Sign-Up Registration Form

**Complete Registration:**  
[nextcrowd.co.uk/register-interest/london-de-group](https://nextcrowd.co.uk/register-interest/london-de-group)

Fill out the form to start the onboarding process.

#### Await Approval:

Post submission, you will be asked to identify your investor type and complete the Investor Appropriateness Questionnaire.



### Step 2:

Identify Your Investor Type

**Select Investor Type:**  
Agree to the appropriate investor statement.

#### Update Status:

Re-certify your status if necessary by pressing the 'I AGREE' button.



### Step 3:

Appropriateness Questionnaire

#### Complete Questionnaire:

Answer questions to determine the suitability of investments.

#### Fail Handling:

You can retake the questionnaire if failed initially. If failed twice, wait two weeks to retry.

## Completing Onboarding

### Unlock Investment Information:

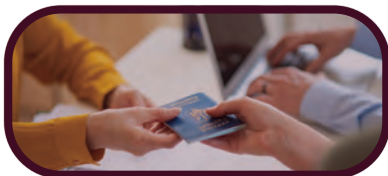
After all steps, access to investment details, downloadable brochures, and investment documents will be granted.

#### Review Period:

New accounts have a 24-hour review period before investments can be made.

## INVESTING STEPS

### STEP 1: KYC PROCESS (ID VERIFICATION AND AML)



#### 1. ID Verification:

Provide required information for ID verification and AML checks via SmartSearch.



#### 2. Complete Verification:

Follow the link from SmartSearch to complete document upload and liveness test.



#### 3. Notification

You will be notified via email once verification is passed.

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## INVESTING STEPS

### STEP 2: PLACING AN ORDER



#### 1. Pass KYC:

After passing KYC, click the green INVEST button.



#### 2. Order Form:

Fill out the order form depending on investment type (Equity, Debt, Debt IFISA).



#### 3. Investment Options

For ISA eligible products, choose investment method (Cash, Transferring ISA, Opening new ISA).

## INVESTMENT METHODS



### Cash Investment & Opening a New ISA

#### Confirmation:

Follow confirmation prompts, complete the checklist, and confirm through our payment partner's T&C's.



### Transferring an ISA

#### Process:

Follow confirmation steps and email instructions for transferring an ISA.

## TRANSFER OF FUNDS

### FUND TRANSFER



NextCrowd will confirm receipt of investment funds and notify the investor via email.