

# eInvest

Enjoy the convenience of never missing an opportunity to invest in Initial Public Offerings (IPO) and other public offers with eInvest by Sagicor

Investments. eInvest is an online platform that facilitates the electronic submission of application forms for Initial Public Offerings (IPO), Additional Public Offerings (APO), Rights Issues and other public offers.

## Key Benefits of eInvest

eInvest provides the following benefits:

- Convenience. With eInvest, applications are submitted electronically; and you can check the status of your application and receive transaction notifications.
- Saves time. With eInvest you no longer have to visit a Sagicor Investments branch or stand in queues to complete the application process.
- Accessibility. You can access eInvest anywhere, at any time.
- Easy tracking. You can track the status of your application by logging in to your eInvest account.

[Click here to sign up for eInvest](#)

## FAQs

### ⊖ What is eInvest?

eInvest is Sagicor Investments' online platform that facilitates the electronic submission of application forms for Initial Public Offers (IPO), Additional Public Offers (APO) or Rights Issues.

### ⊖ What is an IPO?

An Initial Public Offering (IPO) is the process through which a privately held company offers its shares for sale to the public for the first time, transitioning from private ownership to public ownership.

## ⊖ Why should I use eInvest?

eInvest provides the following benefits:

- i. **Convenience.** With eInvest, you can submit your applications electronically without having to provide physical documents to your Investment Advisor or Broker.
- ii. **Saves time.** With eInvest you no longer have to visit a Sagicor Investments branch or any other Broker location. There will be no standing in queues to complete physical application forms.
- iii. **Accessibility.** You can access eInvest anywhere and at any time, once you have an internet connection.
- iv. **Easy tracking.** Once you submit an application, you will be kept up-to-date by receiving transaction notifications by email, and you may track your application by logging in to your eInvest account to view the status of your application.

## ⊖ How do I access eInvest?

Simply go to <https://einvest.sagicorjamaica.com> and register for an account.

## ⊖ What is required to register for an eInvest account?

To register for an account, you will need your active email address.

## ⊖ What technology requirements do I need to access eInvest?

You can access eInvest using your Google Chrome or Microsoft Edge browser.

## ⊖ Do I have to be a Sagicor Investments client to use eInvest?

No. You do not have to be a Sagicor Investments client to use eInvest and make applications for public offers. You may use any active JCSD account on the platform. The platform also allows multiple JCSD accounts to be stored.

**⊖ Does using eInvest automatically enroll me as a Sagicor Investments Client?**

No. If you are interested in opening an account with Sagicor Investments, please contact any one of our Sagicor Investments Wealth Advisors at any branch location or email us at [SIJL\\_IPO@SAGICOR.COM](mailto:SIJL_IPO@SAGICOR.COM)

**⊖ Is there a fee associated with using eInvest?**

No. There is no fee for accessing or using eInvest.

**⊖ What information do I need to successfully submit an application through eInvest?**

In order to successfully submit an application, the following information is required:

- i. Your Tax Registration Number (TRN)
- ii. The active JCSD account number(s) you wish to use for the transaction
- iii. An electronic copy of your valid government-issued photo ID
- iv. Consent form signed by joint account holders for joint applications, or consent form signed by approved signatories for company applications.
- v. Proof of payment (including source of funds and reference number)
- vi. Dividend mandate instructions
- vii. Refund instructions

**⊖ Am I required to sign an application as the primary account holder?**

As long as you accept the terms and conditions of using the eInvest platform, your signature will not be required to submit an application on eInvest as the primary account holder.

**⊖ Are all parties on a joint account required to approve the application?**

Yes. In order for the application to be successfully submitted, all joint holders are required to approve the application, with the exception of minors.

**⊖ How can joint account holders approve the application?**

A joint holder may approve an application by obtaining the signature card from the user of the platform. The signature card will be autogenerated on the platform when the applicant is completing the application. A joint holder once over the age of 18 years is required to sign the signature card. The signature card and identification of the joint holder(s) should be uploaded by the applicant in PDF format. Electronic and written signatures are accepted.

**– If I have completed an application using eInvest, is a printed application required?**

No. Once you have completed an application on eInvest, you will not be required to complete a physical form. If you need additional information on how to complete an electronic application form, you may contact any of our Sagicor Investments Wealth Advisors.

**– How do I make a payment when submitting an application using eInvest?**

There are several payment options available:

- i. Real Time Gross Payment (RTGS) transfer
- ii. JMD Manager's cheque or USD Draft (for USD public offers)
- iii. Wire transfer

Please ensure that you update eInvest with the reference number and proof for your chosen payment method using the instructions provided.

**– When submitting an application form using eInvest, can I use a Jamaica Central Securities Depository (JCSD) account that I maintain with another broker?**

Yes. You can use any JCSD account regardless of the associated broker. Please note that all JCSD accounts must be active.

**– If I do not already have a JCSD account, can I apply for one using eInvest?**

If you do not have a JCSD account, please contact a Sagicor Investments Wealth Advisor at any of our Sagicor Investments branch locations and they will be happy to create an account for you.

**– Do I need to visit or contact my broker if my application is submitted through eInvest?**

No. Once your application is submitted using eInvest, there is no need to visit or contact your broker.

**⊖ How will I know if my application was submitted successfully?**

Once your application is successfully submitted, a notification will automatically be sent to the email address that you used to register on eInvest. The status of your application will also be displayed on your eInvest dashboard.

**⊖ Do I need to set up a default JCSD Account on eInvest to submit an application?**

No, you may submit an application on eInvest without adding a default JCSD Account to your eInvest profile. However, we strongly encourage you to add a default JCSD Account for the best user experience on the eInvest platform.

**⊖ What is the dashboard?**

The dashboard is the first page that you will see once you log into eInvest.

**⊖ Can I cancel an application after I have submitted it via eInvest?**

An application cannot be cancelled once it has been successfully submitted using eInvest. To discontinue the submission of your application, please contact your Sagicor Investments Wealth Advisor, or our Client Contact Centre at 888-SAGICOR (724-4267) or email us at [SIJL\\_IPO@SAGICOR.COM](mailto:SIJL_IPO@SAGICOR.COM)