



# MEMBER ONLINE PORTAL USER GUIDE



[www.hepburnenergy.coop/membership/](http://www.hepburnenergy.coop/membership/)

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## 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 self-service but can be edited by Hepburn Energy staff.

Contact [community@hepburnenergy.coop](mailto:community@hepburnenergy.coop) 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 [website](#) and explore the [Help Centre](#)

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 <https://www.hepburnenergy.coop/membership/>. 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.

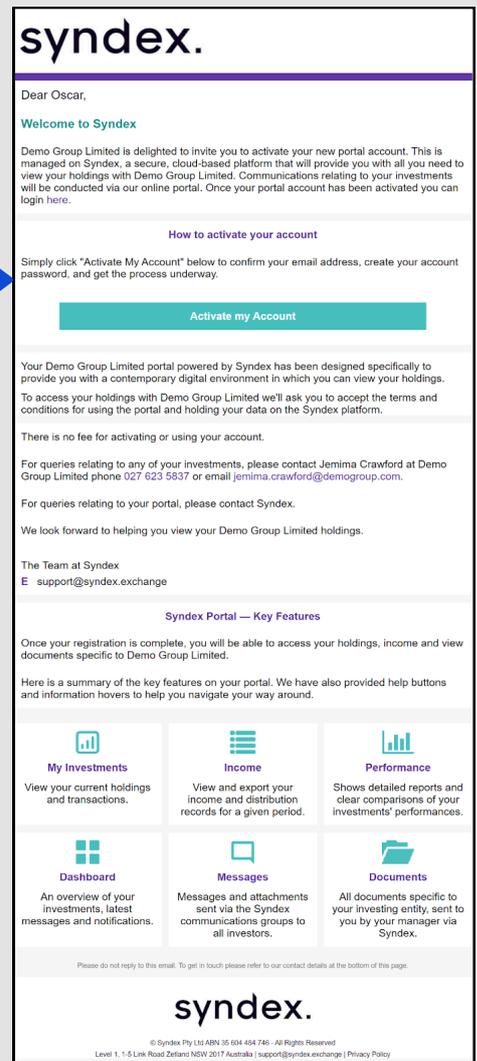
### Step 2

### 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

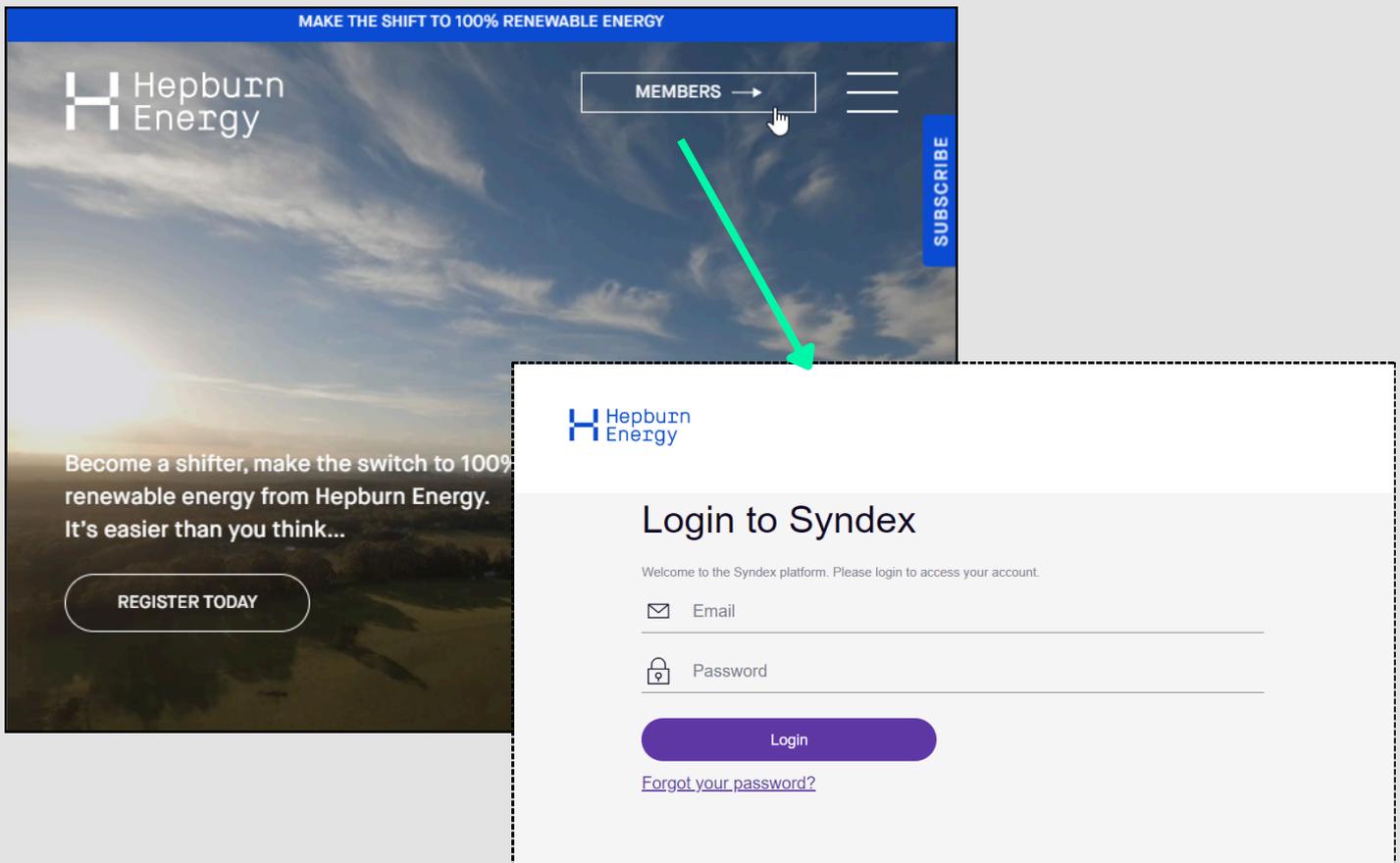
Read and accept the **Syndex Terms and Conditions** and complete the **Declaration**. All your key information is already entered so you will only need to check what's there.



## 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](http://www.hepburnenergy.coop)**



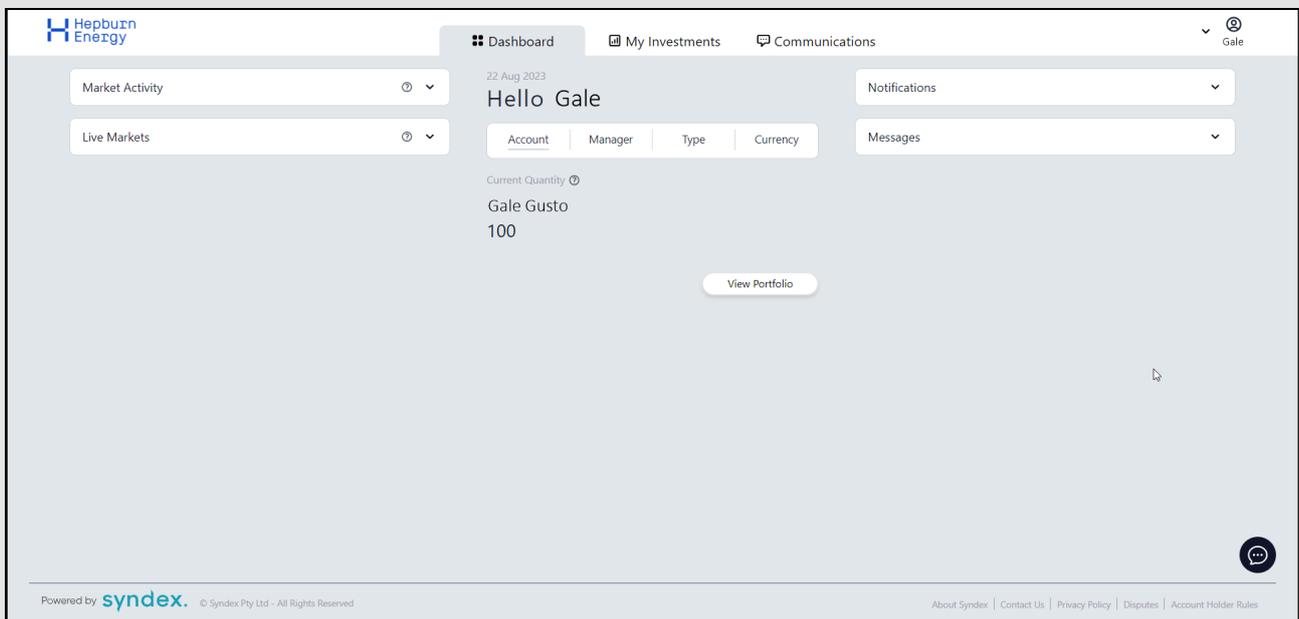
When you log in to the portal for the first time you will be prompted to check your details. Please use this opportunity to check that your details are correct and make any changes necessary. You can find out more about updating your details in section 4 of this booklet.

## 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.



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

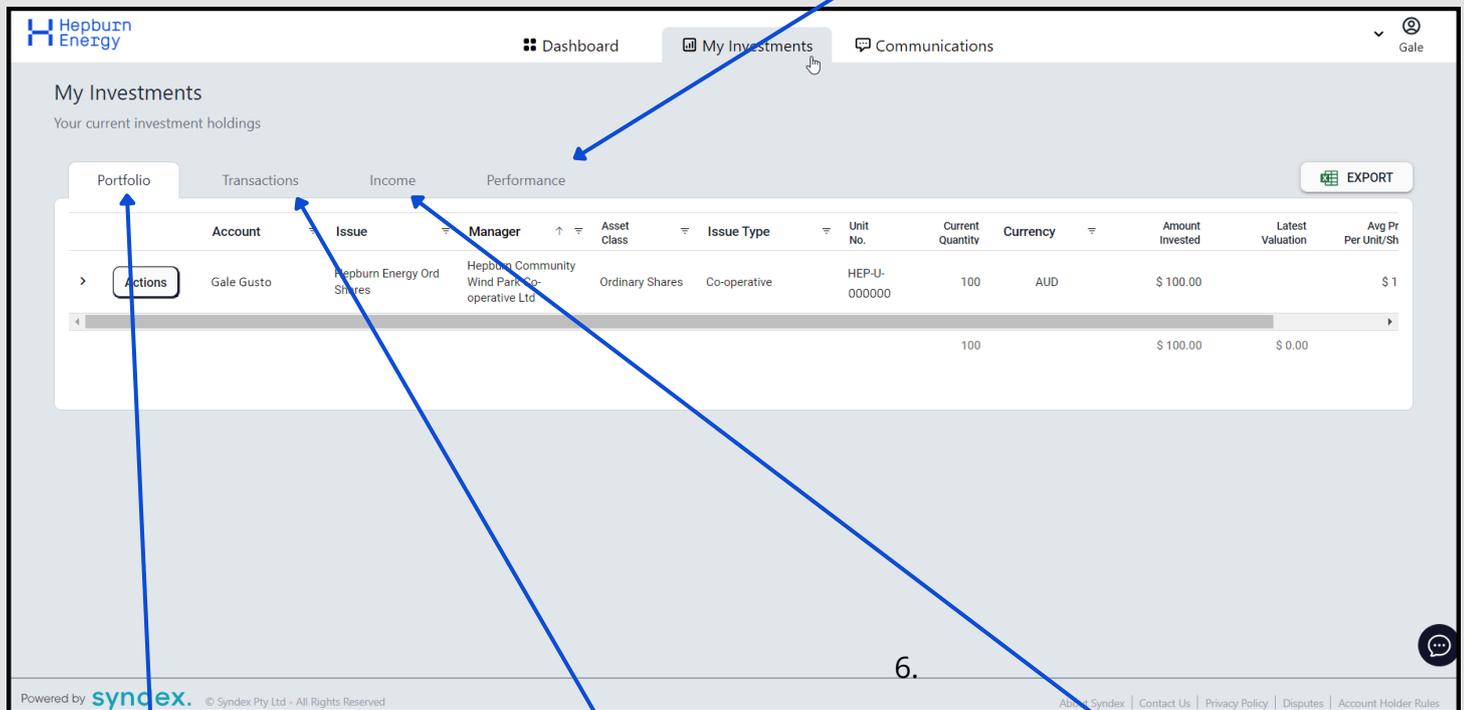
All important messages you receive from Hepburn Energy will be sent to you via email (or post where 'mail only' has been chosen). Occasionally messages through the online portal will be used here for additional reminders.

## 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](mailto:community@hepburnenergy.coop)

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



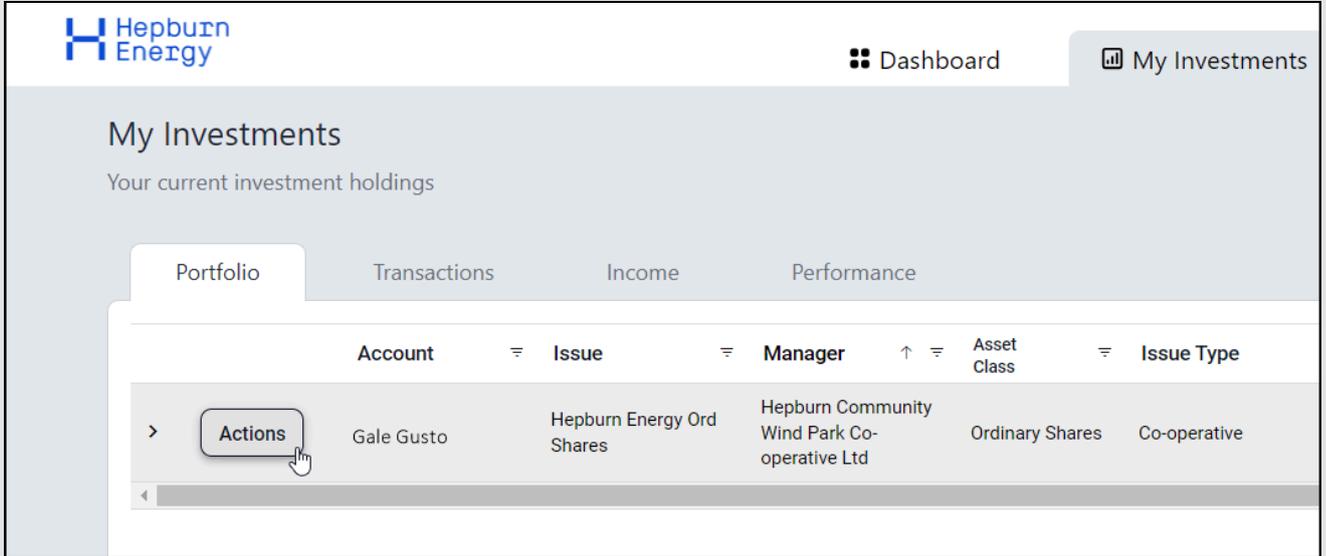
Your **Portfolio** details your current holdings. Click the arrow to the left of a row to expand all transactions for that investment.

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.

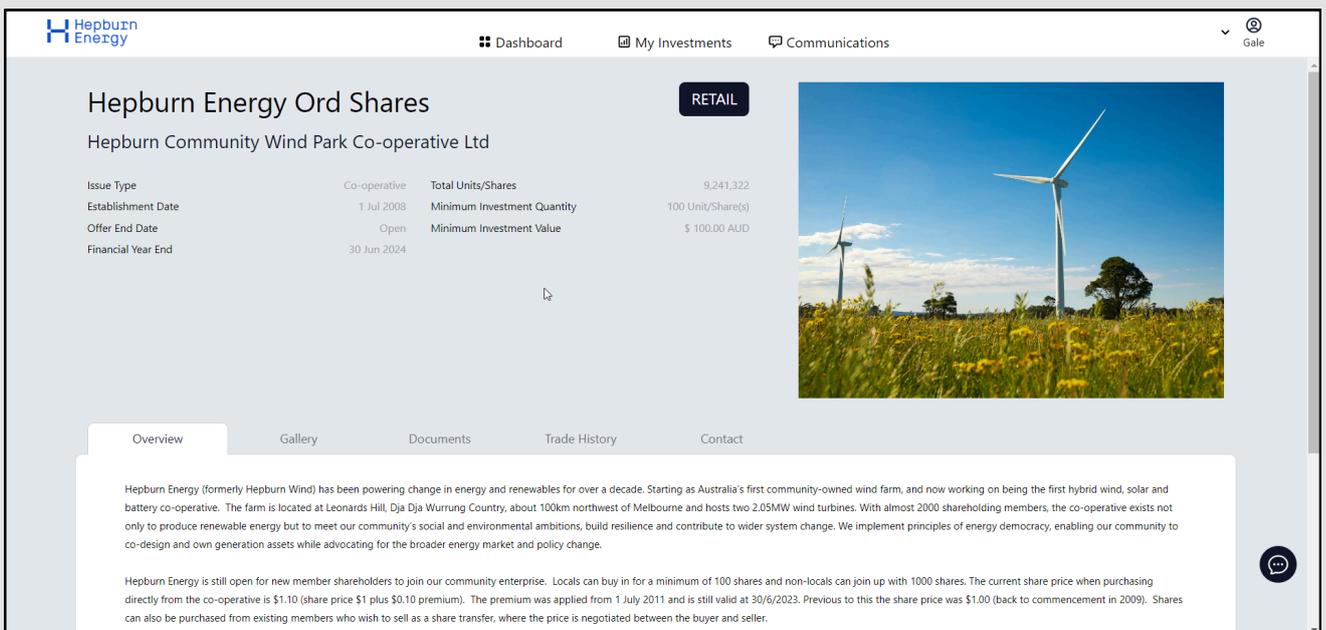
The **Income tab** displays a record of distributions and dividends paid for your investments. This tab does not reflect whether a Dividend Reinvestment or Donation Plan has been activated for the membership and displays the monetary amount of the dividend only.

## Issue Detail Page

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



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:



## 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.

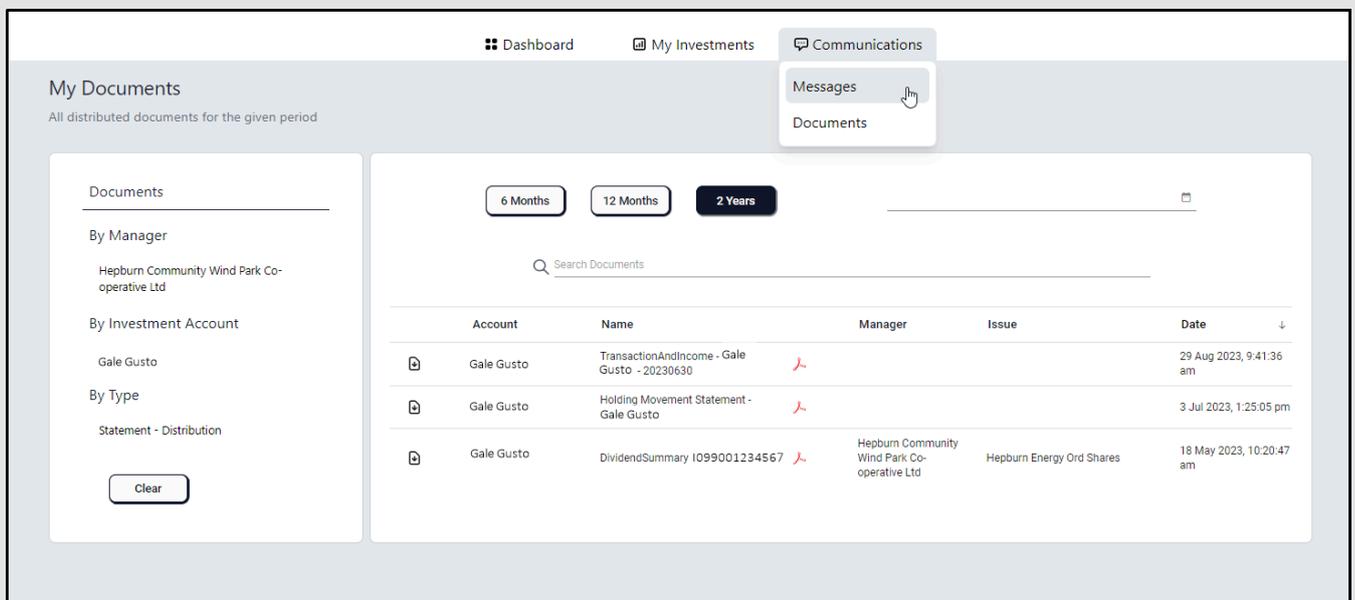
### Messages

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.



My Documents  
All distributed documents for the given period

Documents

By Manager  
Hepburn Community Wind Park Co-operative Ltd

By Investment Account  
Gale Gusto

By Type  
Statement - Distribution

Clear

6 Months 12 Months 2 Years

Search Documents

Account	Name	Manager	Issue	Date
Gale Gusto	TransactionAndIncome - Gale Gusto - 20230630			29 Aug 2023, 9:41:36 am
Gale Gusto	Holding Movement Statement - Gale Gusto			3 Jul 2023, 1:25:05 pm
Gale Gusto	DividendSummary I099001234567	Hepburn Community Wind Park Co-operative Ltd	Hepburn Energy Ord Shares	18 May 2023, 10:20:47 am

You can watch a tour of the **generic** Syndex portal [here](#).

Note: This will have differences from the Hepburn Energy Online Portal. For questions about our portal contact [community@hepburnenergy.coop](mailto:community@hepburnenergy.coop)

## 4. Viewing & Updating Your Details

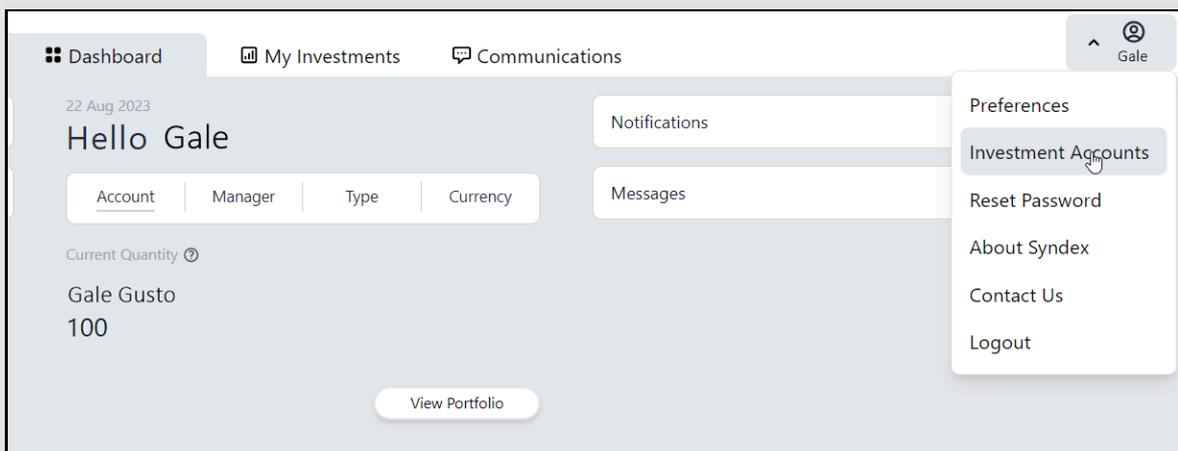
Read on for instructions on viewing and updating your details  
 If you have any questions please contact  
**community@hepburnenergy.coop**

### Viewing & Editing your details

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

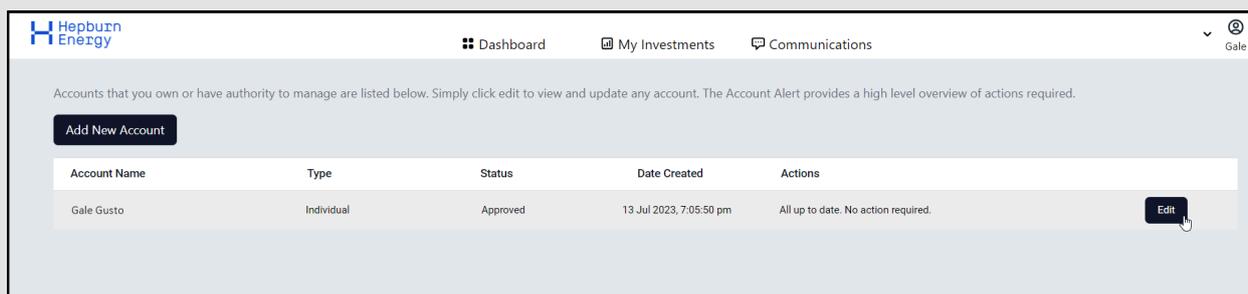
#### Step 1

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.



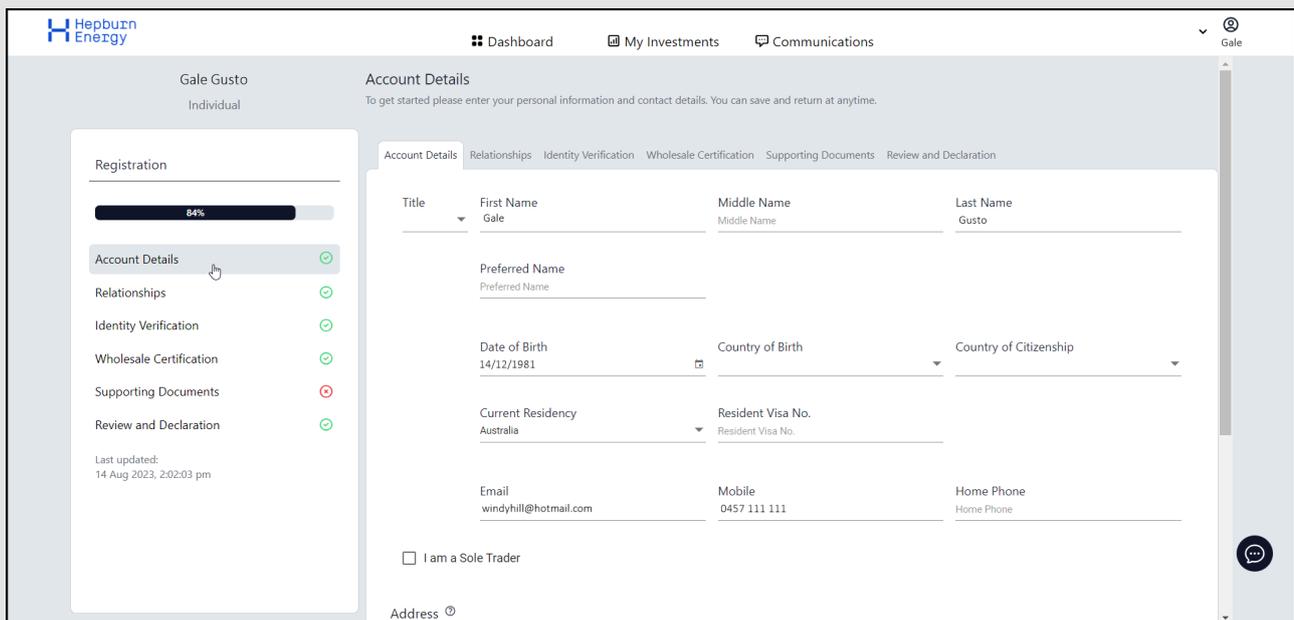
#### Step 2

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



## 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.



The screenshot displays the 'Account Details' page for a user named Gale Gusto. The page is divided into a sidebar and a main content area. The sidebar shows a progress bar at 84% and a list of sections: Registration (84%), Account Details (checked), Relationships (checked), Identity Verification (checked), Wholesale Certification (checked), Supporting Documents (unchecked), and Review and Declaration (checked). The main content area has tabs for Account Details, Relationships, Identity Verification, Wholesale Certification, Supporting Documents, and Review and Declaration. The 'Account Details' tab is active, showing a form with the following fields:

Title	First Name Gale	Middle Name Middle Name	Last Name Gusto
	Preferred Name Preferred Name		
Date of Birth 14/12/1981	Country of Birth	Country of Citizenship	
Current Residency Australia	Resident Visa No. Resident Visa No.		
Email windyhill@hotmail.com	Mobile 0457 111 111	Home Phone Home Phone	

At the bottom of the form, there is a checkbox for 'I am a Sole Trader' and an 'Address' field with a location pin icon.

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 [community@hepburnnenergy.coop](mailto:community@hepburnnenergy.coop).

## 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@hepburnenergy.coop](mailto:community@hepburnenergy.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](mailto: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](mailto: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 [community@hepburnenergy.coop](mailto: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.

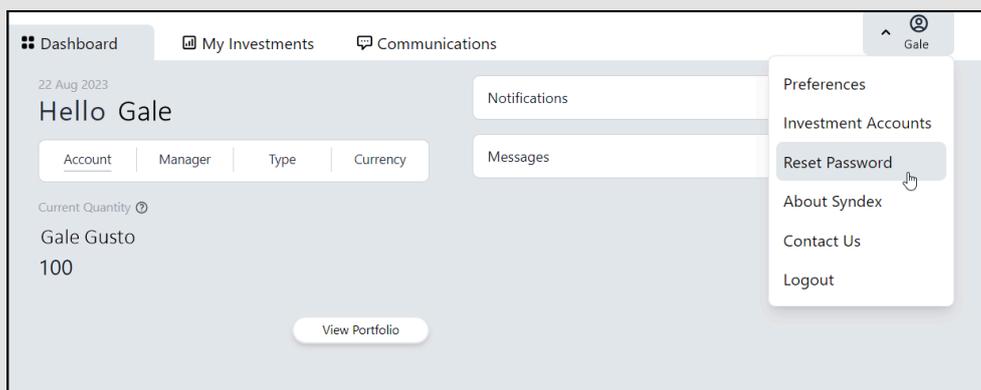
## 5. Troubleshooting

### Activation email not received

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

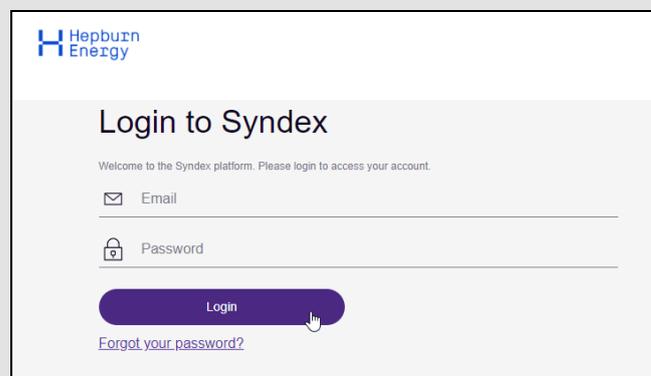
### Resetting your password

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.



### Forgot your password?

On the [login page](#), select Forgot your password and follow the prompts to reset.



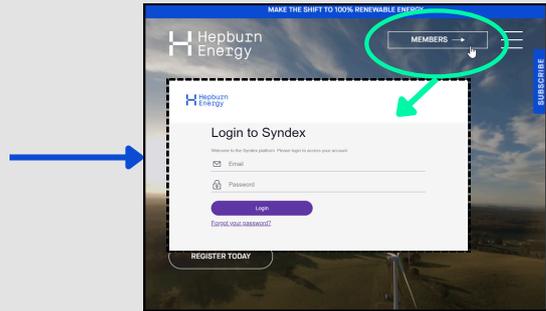
### For any further queries relating to your shareholding

Please contact [community@hepburnenergy.coop](mailto:community@hepburnenergy.coop) or phone (03) 53486760.

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

## Log In

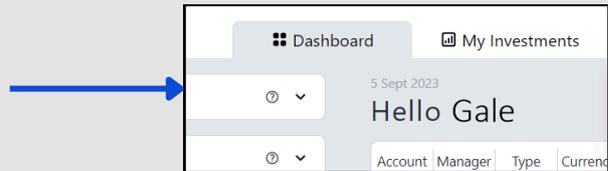
Once your account is activated, you can log in directly at any time by clicking the **member login button** on the top right corner of our website: [www.hepburnenergy.coop](http://www.hepburnenergy.coop)



## View & Edit your Details

### Shareholding

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



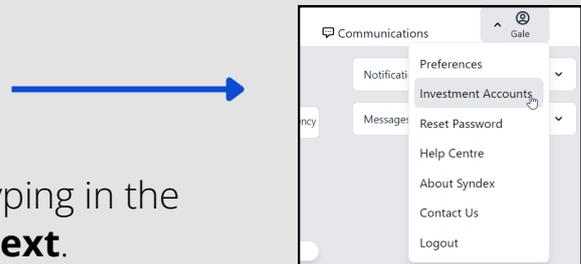
### Statements

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](mailto: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](mailto: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](mailto:community@hepburnenergy.coop) or call (03) 53486760.

