

# eInvest

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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.

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## 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 Sagikor 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.

### **How do I access eInvest?**

Simply go to [www.eInvest.sagicorjamaica.com](http://www.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 all web browsers except Internet Explorer.

### **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.

### **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 [info@sagicor.com](mailto:info@sagicor.com).

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

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

### **Are all parties on a joint account required to sign the application?**

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

### **How do I sign the electronic application form?**

There are two ways to sign the form:

- i. You can download the mobile eInvest signature application via Google Play or the Apple Store, and affix your electronic signature to the application, or;
- ii. You can print, sign and upload the application form to eInvest.

### **For joint accounts, can two separate methods of signing be used for the same application form?**

No. All account holders will be required to use the same method of signing. It is recommended that the method of signing is agreed with all parties prior to signing, in order to avoid any delays or cancellation of the application.

### **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 Investment Advisors.

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

There are several payment options available:

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

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

### **Can I submit a physical application form if I chose not to use eInvest?**

Yes. You can submit a physical application form if you choose not to use the eInvest platform. Simply visit any Sagcor Investments branch location and our Wealth Advisors will be happy to assist.

## **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 your email address. The status of your application will also be displayed on your eInvest dashboard.

## **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 [info@sagicor.com](mailto:info@sagicor.com).

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

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

1. Your Tax Registration Number (TRN)
2. The active JCSD account number you wish to use for the transaction
3. Your valid government issued photo ID
4. All relevant signatures

5. Information regarding your payment method

6. Dividend mandate instructions

7. Refund instructions