



# Place an Investment Order

## TBE Investor User Manual

Use this guide to find a fund, add it to your basket, set an investment amount, review disclosures and submit an order.

### TBE INVESTOR HELP

This guide supports the BIG Exchange Investor Portal. The platform is powered by Zeta Wealth.

## Before you begin

### JOURNEY PURPOSE

Use this guide to find a fund, add it to your basket, set an investment amount, review disclosures and submit an order.

### What you will need

- A TBE Investor account that is open and eligible to invest.
- Enough available cash for the intended investment.
- Time to read the fund information, order summary, costs and charges document.

### Important checks

- Start from a trusted TBE Investor link and check that the address begins platform.tbeinvestor.com.
- Confirm you are working in the correct investor account before submitting information.
- Never share passwords, bank-login credentials or verification codes with another person.
- Review every confirmation screen and retain any reference or document you may need.

### Journey at a glance

| Stage | Action                        |
|-------|-------------------------------|
| 1     | Choose the investment account |
| 2     | Find a fund                   |
| 3     | Open the basket               |
| 4     | Review the basket             |
| 5     | Set the investment amount     |
| 6     | Review the order              |
| 7     | Review costs and charges      |
| 8     | Read the order confirmation   |
| 9     | Check the dashboard later     |

## Step 1 — Choose the investment account

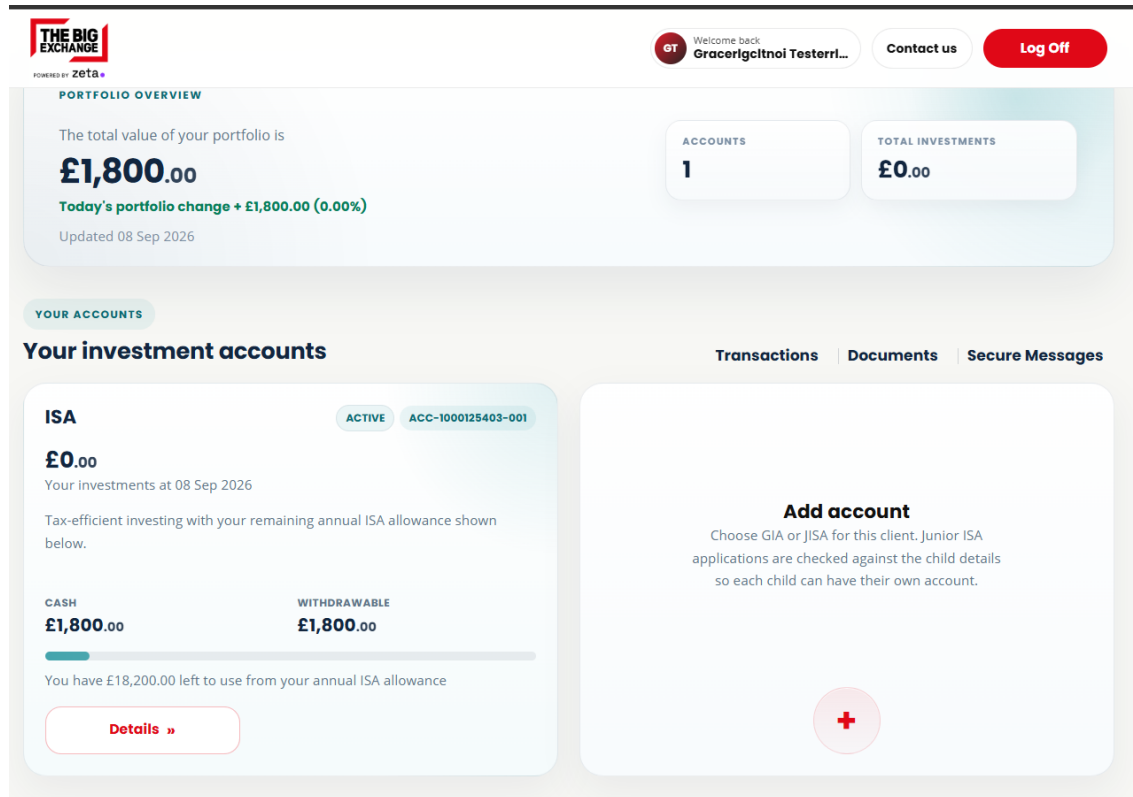


Figure 1. From the Account Dashboard, select the account and choose Invest Now.

### What to do

1. From the Account Dashboard, select the account and choose Invest Now.

### Check before continuing

- Confirm the account type and available cash.

### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

## Step 2 — Find a fund

FUND LIST

Available funds

Use the table views to switch between a quick overview, cumulative performance, and income details.

10 SHOWN

Fund type

Start broad, then narrow by wrapper style.

All

Mutual Funds

ETFs

Bonds

Multi Assets

Search Funds

Try a fund name, theme or provider.

Search by fund name

YOUR ORDER

Select at least one fund to start building an order.

Continue

| FUND NAME                              | ASSET CLASS | FUND TYPE | RISK | ONGOING CHARGE | DISTRIBUTION | ACTIONS                                      |
|----------------------------------------|-------------|-----------|------|----------------|--------------|----------------------------------------------|
| abrdn Ethical Corporate Bond Fund      | Mutual Fund | GBP       | 4/7  | 0.59%          | Accumulation | <div>View fund</div> <div>Add to order</div> |
| abrdn Europe ex-UK Ethical Equity Fund | Mutual Fund | GBP       | 5/7  | 0.85%          | Accumulation | <div>View fund</div> <div>Add to order</div> |

Figure 2. Search or browse Available funds, review the fund information and select Add to order.

### What to do

- Search or browse Available funds, review the fund information and select Add to order.

### Check before continuing

- Check that you selected the intended fund and share class.
- Adding a fund to the basket does not submit an order.

### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

### Step 3 — Open the basket

[Contact us](#)[Basket 1](#)[Log Off](#)

Figure 3. Select the Basket icon to review the selections.

#### What to do

3. Select the Basket icon to review the selections.

#### Check before continuing

- The basket count should reflect the funds added.

#### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

## Step 4 — Review the basket

**BASKET** ×

### Manage your basket

Add funds here first, then continue to the considerations step to set one-off and monthly amounts before review.

|                          |                         |
|--------------------------|-------------------------|
| FUNDS<br><b>1</b>        | SELECTIONS<br><b>1</b>  |
| UP-FRONT<br><b>£0.00</b> | MONTHLY<br><b>£0.00</b> |

---

|                                                               |               |
|---------------------------------------------------------------|---------------|
| <b>abrdn Ethical Corporate Bond Fund</b><br>ISIN GB00B0LNNK80 | <b>REMOVE</b> |
|---------------------------------------------------------------|---------------|

**Continue**

Figure 4. Check the fund list, remove any unwanted selection and select Continue.

### What to do

4. Check the fund list, remove any unwanted selection and select Continue.

### Check before continuing

- Confirm whether the basket is for a one-off or monthly amount before moving on.

### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

## Step 5 — Set the investment amount

**STEP 2 OF 10**

**ORDER DETAILS**

**Review your order details**

Enter how much you would like to invest in each selected fund. We will keep totals, validations, and next-step routing in sync as you edit.

ORDER AMOUNT  
**£0.00**

FUNDS SELECTED  
**1**

AVAILABLE TO INVEST  
**£1800.00**

**CONSIDERATIONS**

**Set your order amounts**

Set the order amount for each fund. Orders use the cash already available in this account.

**CASH BALANCE**  
**£1800.00**

**ALLOCATED ORDERS**  
**£0.00**

**REMAINING CASH**  
**£1800.00**

Orders across all selected funds draw from the same available cash balance in this account.

| FUND                                                                         | ORDER AMOUNT                                                      |
|------------------------------------------------------------------------------|-------------------------------------------------------------------|
| <b>abrdn Ethical Corporate Bond Fund</b><br><small>ISIN GB00B0LNNK80</small> | <input type="text" value="£ 0.00"/><br><small>Minimum £25</small> |

**Continue**

Figure 5. Enter the amount to invest and select Continue.

### What to do

5. Enter the amount to invest and select Continue.

### Check before continuing

- The amount must not exceed available cash. Add money first if the balance is insufficient.

### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

## Step 6 — Review the order

Accounts / Investments / Considerations / **Review**

**FINAL REVIEW**

**Review and place your order**

Check the selected funds and order amounts before you place the order. If anything needs changing, use the breadcrumb or the edit action on a fund card.

SELECTED FUND

**abrdn Ethical Corporate Bond Fund**

ORDER AMOUNT

**£250.00**

Edit

ORDER SUMMARY

Funds selected 1

Order amount **£250.00**

Your order will use the cash already available in this account.

Continue

Figure 6. Check the fund and amount on Review your order details, then select Continue.

### What to do

6. Check the fund and amount on Review your order details, then select Continue.

### Check before continuing

- Use Back or edit controls if the fund or amount is wrong.

### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

## Step 7 — Review costs and charges

[Back](#)
PRE-TRADE DISCLOSURE

### Review your costs and charges before placing this order

This personalised document shows the estimated account fees and fund charges for the investments you've selected. Please preview or download it before you continue.

1
**Review disclosure**

Open the personalised costs and charges document prepared for this order.

2
**Download a copy**

Save the PDF if you want to keep the disclosure for your records.

3
**Place order**

Continue only after you are comfortable with the estimated fees and fund charges.

**Order summary**

ACCOUNT  
**ISA**

SELECTED FUNDS  
**1**

ONE-OFF INVESTMENT  
**GBP 250.00**

CASH AVAILABLE  
**GBP 1,800.00**

The figures in this disclosure are estimates based on your selected funds and current account details. Review the PDF before you continue to place the order.

**Costs and charges document**
[READY TO REVIEW](#)

Preview the disclosure in a new tab or download the PDF for your records. Once it's ready, you can continue with the order.

PDF DOCUMENT
**Preview your costs and charges**

Preview opens in a new tab. You can also download the PDF and keep a copy before you proceed.

Preview PDF
Download PDF

File name: CostAndCharges.pdf

Once you've reviewed the document, continue to place the order. You can return and edit the investment details first if anything needs to change.

Edit investment
Continue to place order

Figure 7. Read the order summary and costs, preview or download the costs and charges document, then select Continue to place order.

### What to do

- Read the order summary and costs, preview or download the costs and charges document, then select Continue to place order.

### Check before continuing

- This is the final review before placement.
- Confirm that you understand the disclosures and charges before proceeding.

### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

### Step 8 — Read the order confirmation

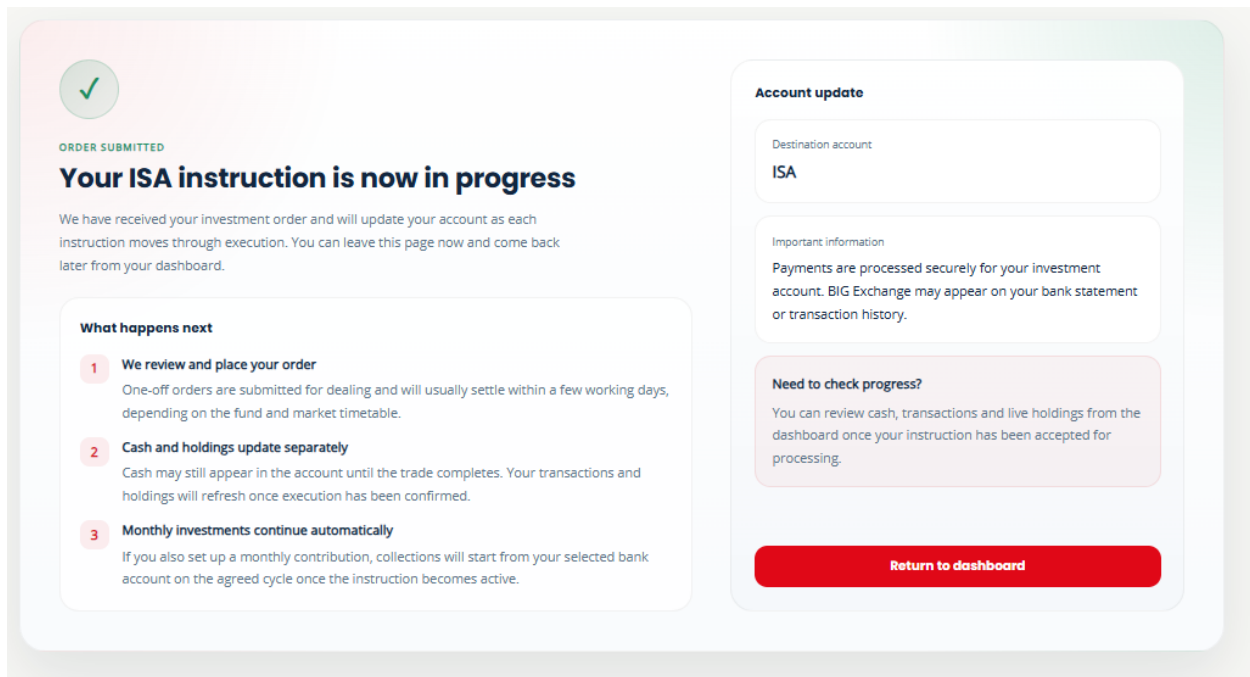


Figure 8. Review the confirmation that the instruction is in progress.

#### What to do

8. Review the confirmation that the instruction is in progress.

#### Check before continuing

- Orders may not complete immediately; the screen explains what happens next.
- Do not place a duplicate order because the dashboard has not updated yet.

#### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

## Step 9 — Check the dashboard later

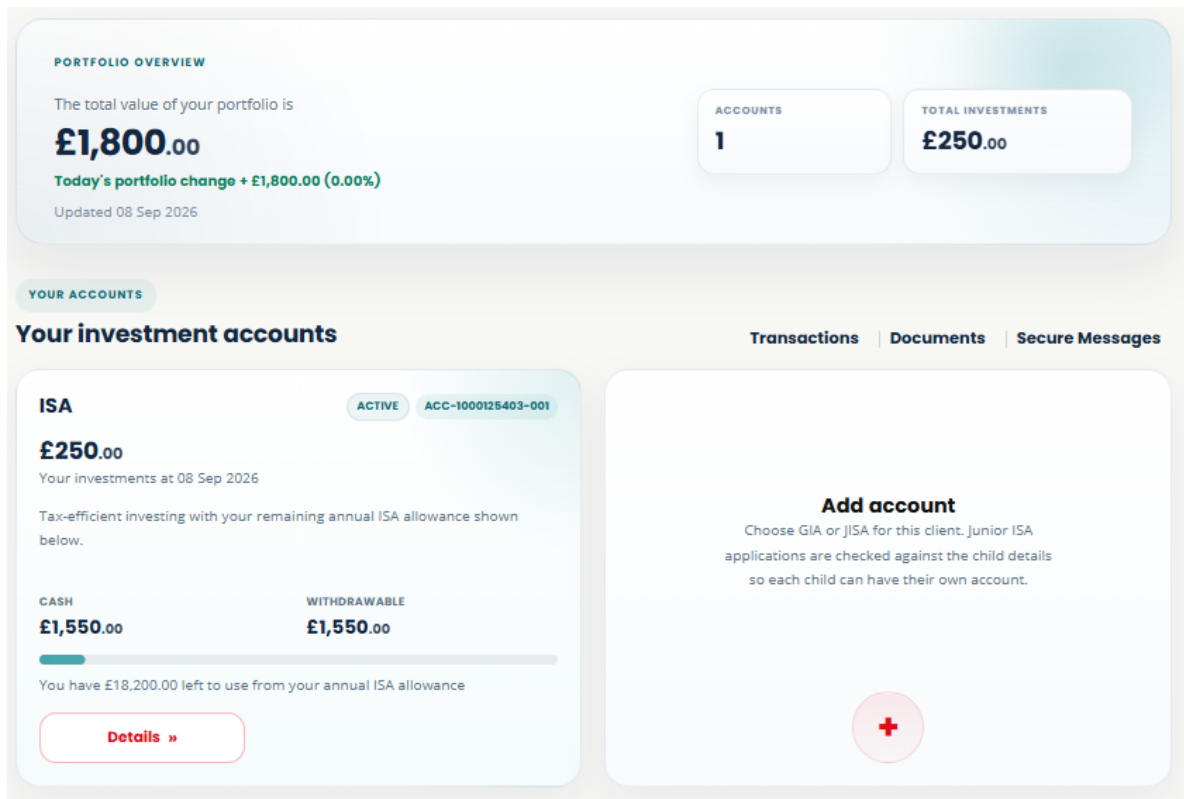


Figure 9. Return to the Account Dashboard and allow time for the investment to appear.

### What to do

- Return to the Account Dashboard and allow time for the investment to appear.

### Check before continuing

- Review the investment value and transactions when processing is complete.

### EXPECTED RESULT

The journey moves to the next screen or displays the status described above. Review the screen before continuing.

## TBE INVESTOR HELP

### Troubleshooting and safe support

| Problem                        | Checks to make                                                  | Next action                                                                 |
|--------------------------------|-----------------------------------------------------------------|-----------------------------------------------------------------------------|
| Fund cannot be found           | Check spelling and selected fund category.                      | Review available filters or return later if the fund is unavailable.        |
| Continue is disabled           | Check that a fund and valid amount are selected.                | Correct missing or invalid information.                                     |
| Available cash is insufficient | Compare the order amount with the cash balance.                 | Reduce the order or add money before continuing.                            |
| Document will not open         | Allow downloads/pop-ups from the trusted portal and retry once. | Do not place the order until you can review the required disclosure.        |
| Order is not on the dashboard  | The instruction may still be processing.                        | Wait for processing and check transactions before submitting another order. |

### Protect your information

- Do not send passwords, one-time codes or bank-login credentials to support.
- Provide the journey step, approximate time and exact non-sensitive error message.
- If you suspect unauthorised activity, stop and contact TBE support promptly.
- Sign out when finished, especially on a shared device.

### DOCUMENT SCOPE

Screens and labels may change as the service is improved. Follow the current on-screen wording while applying the security and review checks in this guide. This TBE Investor help manual describes a platform powered by Zeta Wealth.