



## My Wealth Planner Portal User Guide

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ARM

My Wealth Planner Portal

Invest In  
ARM Mutual Funds

ARM Ethical Fund  
ARM Discovery Fund  
ARM Aggressive Growth Fund

Client Logon

Username:

Password:

Tip! Enter your username and password correctly

Enter »

Forgot Password?

ARM News

Lakowe Lakes Golf & Country Estate: The world class 18-hole golf course is ready for play. Golf membership and homes now available for sale, for enquiries send email to [info@lakowelakes.com](mailto:info@lakowelakes.com) or visit [www.lakowelakes.com](http://www.lakowelakes.com)

Real Estate: Looking for affordable property in a secured estate with good infrastructure on the Lekki-Epe axis? Adiva & Farapark Estates offers you an opportunity to own your home. For enquiries send email to [enquiries@arminvestmentcenter.com](mailto:enquiries@arminvestmentcenter.com)

ARM Research: Equities at a glance. Click [here](#) for the latest market snapshot

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The WRAP user name (e.g. WP2000) and password (e.g. pwd200) should be inserted in this section.

ARM My Wealth Planner

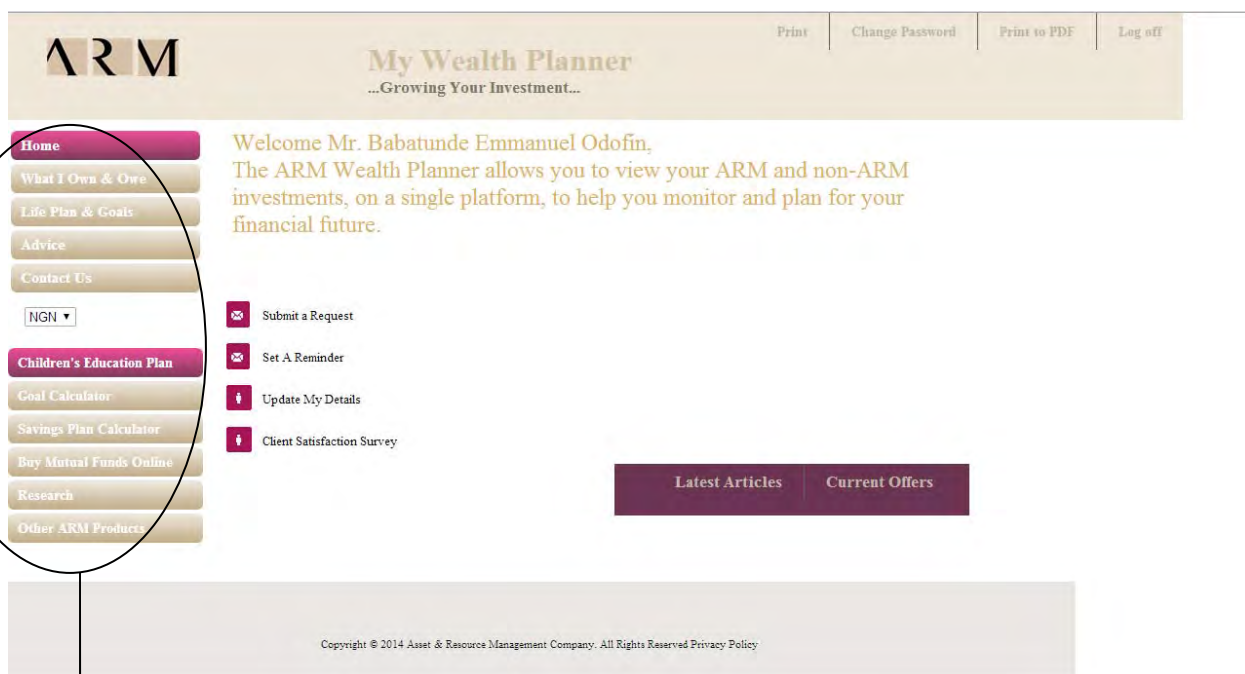
Retrieve Forgot Password

User ID:

Registered Email Address:

Submit

This link helps you generate your password if forgotten. Click on the link above and enter your User ID and email address.



**What I own & owe:** Gives you a summary of your Investment(s).

**Life Plan & Goals:** Enables you plan and project for future financial goals.

**Advice:** Provides information and advice on various investment topics.

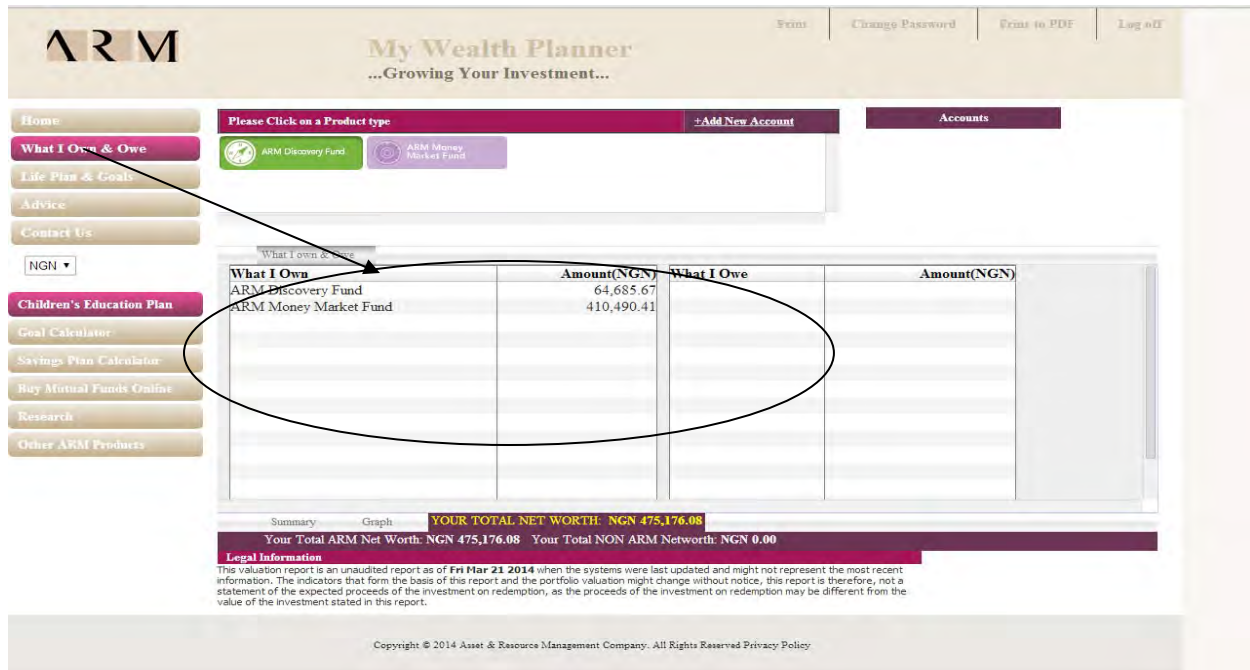
**Contact Us:** Provides the addresses, phone numbers and email addresses of all the ARM Investment Centers across Nigeria.

**Children's Education Plan:** This is a financial calculator that helps you plan and forecast on your children's education.

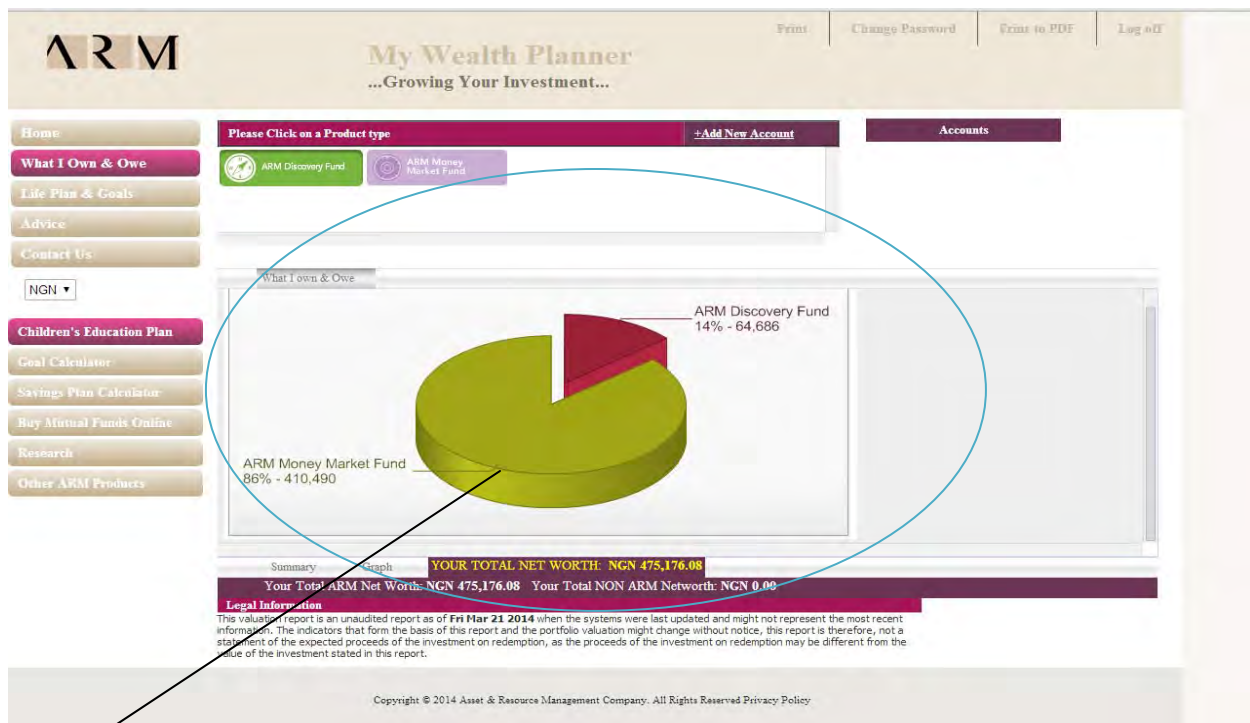
**Savings Plan Calculator:** This financial calculator enables you plan, as well provide good projections to helping you achieve set objectives.

**Buy Mutual Funds Online:** This link leads you to the Quick Teller portal that enables you purchase additional units of ARM Mutual Funds online.

**Research:** This link re-directs you to our research web site. The website provides you with the market report, research analysis/forecast information and other relevant market updates.



**What I own and owe:** This gives you a total summary of your investments with ARM.



**Graph:** This shows the graphical representation of the value of your investment(s) in relation to the amount of money invested in each fund.

ARM My Wealth Planner ...Growing Your Investment...

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NGN

Children's Education Plan | Goal Calculator | Savings Plan Calculator | Buy Mutual Funds Online | Research | Other ARM Products

Please Click on a Product type: ARM Discovery Fund | ARM Money Market Fund

+Add New Account

Accounts: Babatunde Emmanuel Odofin

What I Own & Owe: IV040451ST001EGFN000001

Your Account		Your Account Executive	
First Name:	Babatunde Emmanuel	Account Executive Name:	Idehen-Isa Ojeaga Nathaniel
Surname Name:	Odofin		
Holding Number:	IV040451ST001EGFN000001		
Price Per Unit:	289.31		
Number of Units:	223.58		
Total Value:	64,685.67		

Summary | Graph | YOUR TOTAL NET WORTH: NGN 475,176.08

Your Total ARM Net Worth: NGN 475,176.08 Your Total NON ARM Network: NGN 0.00

**Legal Information**  
This valuation report is an unaudited report as of Fri Mar 21 2014 when the systems were last updated and might not represent the most recent information. The indicators that form the basis of this report and the portfolio valuation might change without notice, this report is therefore, not a statement of the expected proceeds of the investment on redemption, as the proceeds of the investment on redemption may be different from the value of the investment stated in this report.

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**Product type selection:** This tab displays a summary of investments per product.

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Please Click on a Product type: ARM Discovery Fund | ARM Money Market Fund

+Add New Account

Accounts: Babatunde Emmanuel Odofin

What I Own & Owe: IV040451ST001EGFN000001

Your Account		Your Account Executive	
Title:	Mr.	Account Executive Name:	Idehen-Isa Ojeaga Nathaniel
First Name:	Babatunde Emmanuel	Price Date:	Mar 20 2014 12:00AM
Surname Name:	Odofin	ARM Discovery Fund Bid Price:	289.3161
Fund Code:	EGF	ARM Discovery Fund Offer Price:	298.0392
Fund Name:	ARM Discovery Fund	Aggressive Growth Fund Bid Price:	14.2484
Holding Number:	IV040451ST001EGFN000001	Aggressive Growth Fund Offer Price:	14.6780
Price Per Unit:	289.3161	ARM Ethical Growth Fund Bid Price:	23.3328
Total Value:	64,685.67	ARM Ethical Growth Fund Offer Price:	24.0362

Summary | Graph | Statement | Transaction | YOUR TOTAL NET WORTH: NGN 475,176.08

Your Total ARM Net Worth: NGN 475,176.08 Your Total NON ARM Network: NGN 0.00

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**Investment Name Tab:** The investment name tab displays a more detailed summary of the product type selected, as well as information on other ARM Mutual Funds.





**Investment Product Graph:** This graph is a representation of the activity in your account in respect to your deposits and redemptions.

**What I Own & Owe**

Your Account	
Account Number:	IV040451ST001EGFN000001
Closing Price:	NGN 289.32
Date Started:	6/29/2012 1:54:13 PM
Initial Contribution:	NGN 10,000.00
Total Addition:	NGN 210,000.00
Total Redemption:	NGN 150,000.00

**YOUR TOTAL NET WORTH: NGN 475,176.08**  
**Your Total ARM Net Worth: NGN 475,176.08** **Your Total NON ARM Network: NGN 0.00**

**Legal Information**  
 This valuation report is an unaudited report as of **Fri Mar 21 2014** when the systems were last updated and might not represent the most recent information. The indicators that form the basis of this report and the portfolio valuation might change without notice; this report is therefore, not a statement of the expected proceeds of the investment on redemption, as the proceeds of the investment on redemption may be different from the value of the investment stated in this report.

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**Statement:** This tab provides a breakdown of the transactions details of your account.

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Please Click on a Product type

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Accounts

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What I Own & Owe

IV040451ST001EGFN000001

Date From

Date TO

Run Report with Criteria Selected

Date	Type	Investment	Unit Price	No of Units	Cert. Status
05-Mar-2014	Subscriptions	10,000.00	308.3302000000000000	32.4327000000000000	Processed Subscription
05-Feb-2014	Subscriptions	10,000.00	328.7482000000000000	30.4184000000000000	Processed Subscription
27-Jan-2014	Subscriptions	10,000.00	338.8342000000000000	29.5129000000000000	Processed Subscription
05-Dec-2013	Subscriptions	10,000.00	329.2095000000000000	30.3757000000000000	Processed Subscription
27-Nov-2013	Subscriptions	10,000.00	329.0455000000000000	30.3909000000000000	Processed Subscription
20-Nov-2013	Redemptions	150,000.00	316.3304000000000000	474.1877000000000000	Processed Redemption
30-Oct-2013	Subscriptions	10,000.00	324.9455000000000000	30.7743000000000000	Processed Subscription
29-Oct-2013	Subscriptions	10,000.00	323.2542000000000000	30.9354000000000000	Processed Subscription
27-Aug-2013	Subscriptions	10,000.00	318.1907000000000000	31.4276000000000000	Processed Subscription
22-Jul-2013	Subscriptions	10,000.00	331.9250000000000000	30.1393000000000000	Processed Subscription

Summary

Graph

Statement

Transaction

YOUR TOTAL NET WORTH: NGN 475,176.08

Your Total ARM Net Worth: NGN 475,176.08

Your Total NON ARM Net Worth: NGN 0.00

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**Transaction:** This tab shows a comprehensive breakdown of your transactions (i.e. the history of all contributions and redemptions in your account during a particular period).

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Please Click on a Product type

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Accounts

Babatunde Emmanuel Odojin

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Life Planner: How much do you need to Save?

ARM Life Planner is a Calculation and Planning tool that uses your personal goals, matched with your risk profile, to calculate how much you need to save to reach your investment goal.

How do we get to these numbers?

Summary of Event

Select Currency Here

Naira

How much will your goal cost in today's value

0

How long do you have to achieve your goal?

5

Lump sum amount you would like to invest?

0

Your monthly saving

0

Your risk group

Aggressive

Investment value

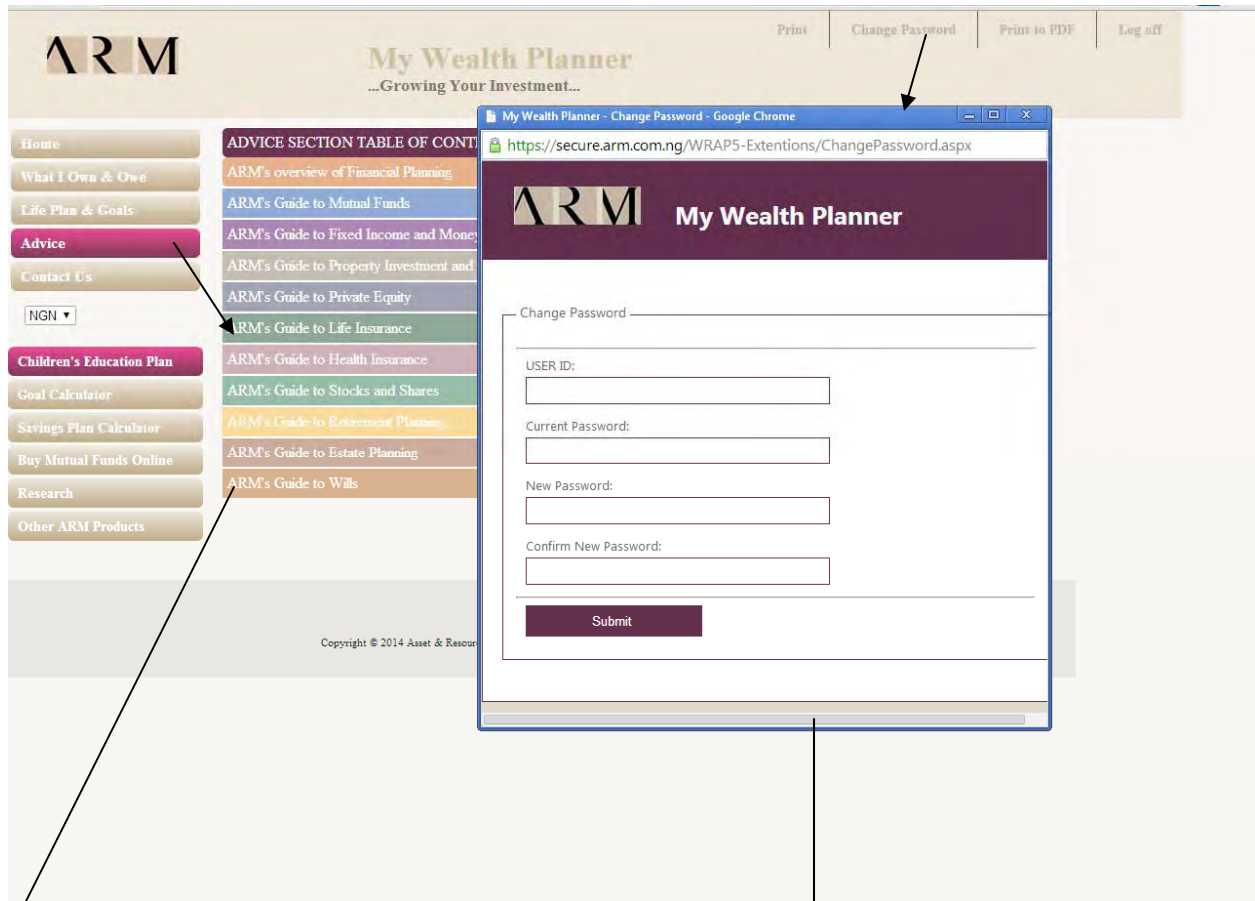
Future Value of Lump sum Investment in:

Poor market conditions

Average market conditions

You will need to save at least N 0 per month to reach your target amount.

**Life Plan & Goals:** This template helps you plan to meet your future financial goals. It provides such information as projected estimated cost, value of future financial goals and amount required.



**Advice:** Displays various topics on product types that can be purchased on the ARM platform and the financial market.

**Change Password:** Enables you change or update your password, by filling out the required fields in the pop up box shown above.



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- ARM's Overview of Financial Planning
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- ARM's Guide to Fixed Income and Money Market Investments
- ARM's Guide to Property Investment and Mortgages
- ARM's Guide to Private Equity
- ARM's Guide to Life Insurance
- ARM's Guide to Health Insurance
- ARM's Guide to Social Security and Other

You don't need to be wealthy to need financial planning. In fact, people with modest means need it more in many ways.

Financial planning is that activity that provides a direction for achieving life goals using finite resources. Your life goals could include getting married, buying a house, educating children, changing your career or starting a business, saving for your retirement and leaving an inheritance; whatever they are, prudent management of your finances is what helps you to achieve your goals.

This is the principle behind the Life Planning section of this on-line service. You can use it to map out not just your goals and life events, but also those of your spouse, children and even parents.

Here are our key overall guidelines for good financial planning:

- Have specific, realistic and measurable goals with a reasonable time-frame and a purpose such as "I need 1 million in 5 year's time for school fees."
- Understand that financial needs and decisions impact each other. For example, your decision to buy a new house may affect your ability to pay for your child's education need to support ageing parents may slow down your ability to retire early. Proper planning looks at all the needs and people in your life either now or in the future.
- You should try as much as possible to link specific goals with specific investment vehicles. Some are obvious such as Retirement Savings Accounts. Others may not be, investing in a Mutual Fund to buy a new car in 2 years' time, or starting a stock portfolio with 10-year time-frame to help you buy a second home.

The time-frame of your goals, your personal preparedness to take risks, your level of other liquid assets, will all help to determine whether you should invest in equities, mutual funds, bonds or real estate.

Because life is dynamic, you need to review your financial plan regularly to ensure that it remains relevant to meeting your needs.

- Don't delay, start now. By developing good financial planning habits you will be better prepared to meet life's challenges and emergencies. If you start saving for retirement example, at 25, you will massively leverage your assets because of that most magic ingredient: time.
- Educate yourself on financial planning and investment opportunities by reading, attending seminars and listening to other people's successes, mistakes and wisdom.
- Use good financial advisors but don't lose your own common-sense and judgement.
- If you find financial products dull or difficult (and many people do) ask your advisors to explain the jargon or remove it completely.
- Visualise difficult ideas such as the effect of inflation or compound interest and use calculators such as those in this section for retirement planning.

There are guides to various financial concept or investment vehicles in this Advice section. We have tried to make them interesting, clear and simple. If you would like to discuss any aspect of financial planning, please contact one of our Wealth Advisors or visit one of our Investment Centers.

**Advice:** This is a glossary on financial resources.