

# SOUTH YORKSHIRE EQUITY PLATFORM



## Instructions on registering as an Investor on the South Yorkshire Equity Platform

- A step-by-step guide

### Overview

The South Yorkshire Equity Platform is a dedicated resource aimed at increasing investment into businesses across our region by matching businesses looking to raise investment with investors looking for opportunities to invest.

This guide provides detailed instructions on how to register for the platform.

### Visit the Registration Page

1. Visit [SY Business Support](#)
2. Click on link at the bottom of the page.
3. Click "Register here"
4. Click "Register as an investor"

### Create an account

1. The registration form will load. On this page you will be asked to provide your contact details.
2. Enter your first and last name.
3. Provide a valid email address that you frequently check.
4. Use a strong password that you will remember. It should include a mixture of letters, numbers, and special characters.
5. Re-enter your password to ensure it matches the one you provided earlier.
6. Read the Privacy Policy and Accessibility policies by clicking the links.
7. If you agree with the policies, tick the boxes.
8. After filling out the form, review your information for accuracy, and then click on the "Register" button.

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## Verify your account

1. Once you have submitted the registration form, you will receive an email asking you to verify your email address.
2. Open this email and click on the verification link provided. If you do not see the email in your inbox, check your spam/junk folder. If the email is not there, then navigate back to your web browser and click "Resend Verification Email".
3. Once you have verified your account you will be taken to a screen displaying "Register as an investor".
4. Select the option "Investment Professional" and provide the required details in the four questions that follow.
  - Please note that you only need to complete minimal information in questions 3 and 4, there is no requirement for lots of information.
  - Please note that we cannot accept applications from Sophisticated Investors or High Net Worth Investors at this time.
5. Complete the marketing question.
6. Read through the declaration. If you agree, tick the "declaration" box and press "submit".
7. You will then be taken to a page where there is a welcome video and a holding message whilst your account is being reviewed by the team, awaiting approval.
8. Once your account has been approved, you will receive an email confirmation.

## Set-up payment information

- Please log back in and click the "Next" box. This will take you to a "payment" page, please complete the billing address details, and then click "Next" at the bottom of the page.
  - There is no charge, but at this point you have to go through this page until the process is amended.

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## Set up your profile

1. When you first login to your account, you be first taken to your dashboard, which will show all the businesses that are presently registered on the platform.
2. At this point you need to edit your profile; you can do this by clicking on your initials in the top right corner of the page and going to “Edit Profile”.
3. At this point you can choose your preferences.
  - Put the post code as your office post code
  - Choose up to 4 sectors, technologies and skills that interest you.
  - Click “Save” once you have completed these sections.
4. When you select your preferences, you will be notified via email if a business registers and has also listed any of these preferences.
  - This way you only need to go into the platform if you are notified there is a match.
  - Please note, that even when you have selected your preferences, every business will show on your dashboard so you can browse through wider opportunities, if you so wish.
5. Please complete the 2 boxes within “Your Profile”. This is information that a business will see if you mark an interest in them which you then intend to follow up.

## Using the platform

1. To view opportunities, click on the “Businesses” tab to view all opportunities or click on “Dashboard” to view businesses that match your profile.
2. You can view an opportunity by clicking on it.
3. You will then be taken into their page where you can view the full opportunity including any documents (such as a pitch deck).
4. If you are interested in finding out more about the opportunity, then please click on the “Mark Interest” box and press “Confirm”.
5. At this point the business will get an email confirming that an investor has marked an interest, and you can then make contact with the business to find out more information.

Good luck and thanks for registering. If you have any questions during registration, please email [andrew.mckenna@southyorkshire-ca.gov.uk](mailto:andrew.mckenna@southyorkshire-ca.gov.uk)