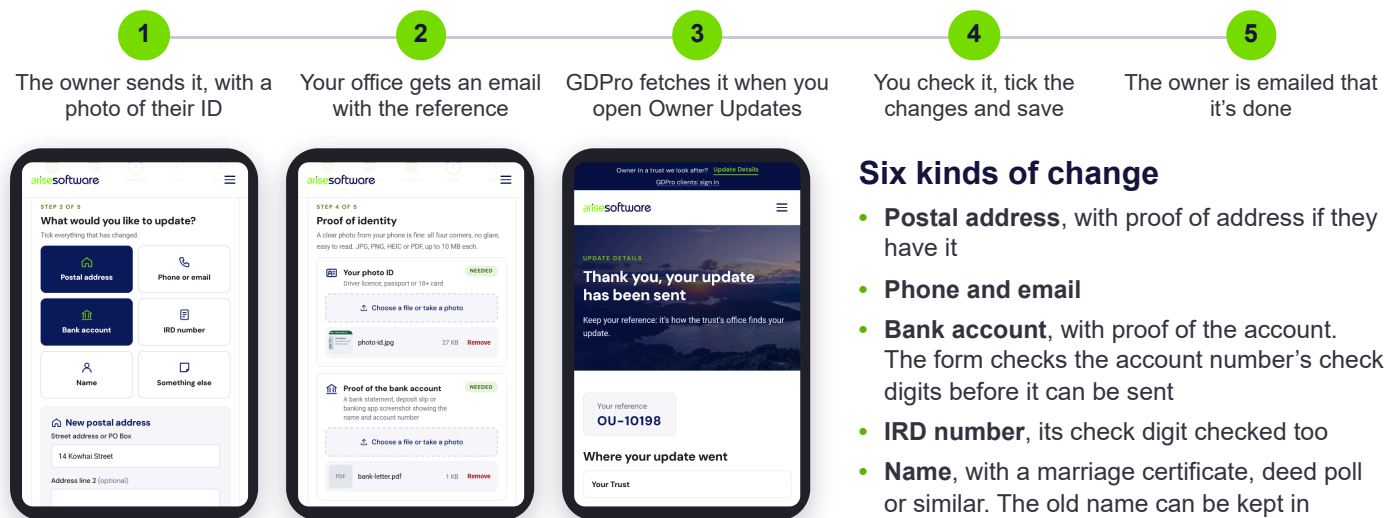


Owners Update Their Own Details.

Owner Updates: owners send changes from their phone, and your office saves them into GPro.

How it works



The owner and the trust in these pictures are made up.

Six kinds of change

- **Postal address**, with proof of address if they have it
- **Phone and email**
- **Bank account**, with proof of the account. The form checks the account number's check digits before it can be sent
- **IRD number**, its check digit checked too
- **Name**, with a marriage certificate, deed poll or similar. The old name can be kept in GPro as an alias
- **Something else**, in the owner's own words

On a phone, tablet or computer, with no login. An owner in several trusts ticks each one, and gets a reference straight away.

SAFEGUARDS

What protects your owners

- Each trust sees only its own updates
- Nothing reaches GPro until someone in your office saves it
- When an owner's email changes, their old address is told too
- Emails never carry owners' documents, addresses, bank accounts or IRD numbers
- Proof documents are deleted 30 days after every trust has finished the update
- Records stored in Aotearoa New Zealand

WHAT ARISE SETS UP

For each trust

- Your trust on the owners' form, under the name owners know it by
- Your trust's own link, for a newsletter, a letter or your website
- A key for your GPro database. It goes in once, in GPro's Owner Updates settings
- The addresses your office is told at, each sent a test email first

Several trusts, one office: each login works every trust in it.

Owners moving house, or changing banks?

Arise Software · support@arisesoftware.co.nz · arisesoftware.co.nz

Screens shown with a made-up owner · page 1 of 3

From the owner's phone —
into your GPro.

Checked and Saved in GPro.

Nothing changes in GPro until someone in your office ticks the changes and saves.

GPro's Home › Owner Updates screen. The owner and the trust are made up: name, date of birth, address and bank account are invented.

- 1 The updates waiting for your trusts, and what each owner wants to change
- 2 What the owner sent, as they gave it
- 3 GPro suggests the likely owner from the owner number, date of birth and names
- 4 Each change beside what GPro has now. Click a new value to change it; GPro checks it first
- 5 Their proof opens inside GPro. The documents you tick are filed with the owner
- 6 Save to GPro writes the ticked changes. The Audit Log records each one under your name

THE OWNER'S PROOF

Checked before it opens

- No web browser needed, on remote desktop or your own computer
- It must really be a photo or a PDF, or GPro won't open it
- A PDF holding scripts or attached files is shown in GPro only, never filed
- Links inside an owner's PDF are never followed

TAKING PART

One form for your office

- arisesoftware.co.nz/update-details/for-trusts, listing every trust your office runs
- Arise checks each request with the trust, then sets it up
- Needs GPro from October 2026 or later, hosted by Arise or on your own computer or server
- What it costs: ask us at support@arisesoftware.co.nz

Ready to take part?

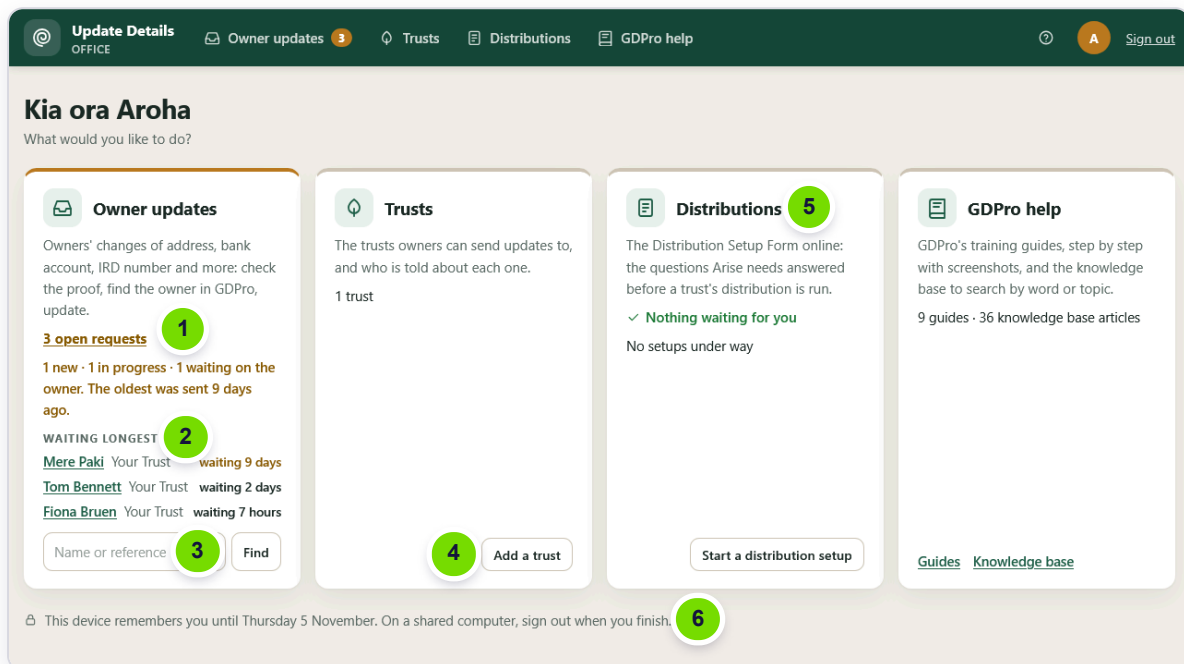
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Screens shown with a made-up owner · page 2 of 3

Checked by your office —
saved in GPro.

Your Office, Online.

At arisesoftware.co.nz/admin, what is waiting is the first thing you see.



Home, as someone in a trust's office sees it after signing in. The people and the trust are made up.

- 1 What is waiting for your office, one click from each
- 2 The updates that have waited longest, each straight to its page
- 3 Find any update by name, reference or date of birth
- 4 Add a trust yourself, once Arise has switched this on for your login
- 5 Distribution setups and GDPro help, with the same sign-in
- 6 Remember me: your own computer or phone stays signed in for 30 days

YOUR OFFICE'S DETAILS

Kept up to date by you

- Add your trusts and offices, once Arise switches this on for your login
- Change who is told about updates, and who owners can ask
- A trust you add goes on the owners' form once Arise has checked it
- GDPro keys, logins and deleting stay with Arise

SIGNING IN

Safe on a phone or computer

- Everyone in your office has their own login
- A new computer or phone asks for a code we email you
- No password to hand? We email you a link that signs you in
- My account lists where you're signed in, and signs out a lost phone