TrinityBridge

TrinityBridge Mobile App

Frequently Asked Questions

Access and Setup

Installing the App

Where can I find and install the App?

1. You can find our App by searching for 'TrinityBridge' on the Apple App Store or Google Play Store.

Logging In
How do I login to the App for the first time?

Can I use biometric login?

1. To use the TrinityBridge App you must first have access to our online Client Portal.

   Existing clients should contact our Investor Support Team for queries regarding their portal account. If you have a TrinityBridge Adviser or Investment Manager and would like to use our App but do not currently have access to our online portal, please speak to your registered contact to arrange for this to be set up for you.

2. When logging into the App for the first time, if your device supports it you may be prompted with a question asking if you would like to use 'biometric' login (fingerprint or facial recognition) to log in next time.

   Select 'Yes' or 'No' as preferred. **Please be aware** if multiple people are set up with biometric details on your device, they will be able to bypass the initial log in screen. They will however be prompted to enter characters from your memorable word to gain full access. We suggest disabling biometric login details for other users if this is the case to prevent unauthorised access to your account (see page 2 on how to do this).

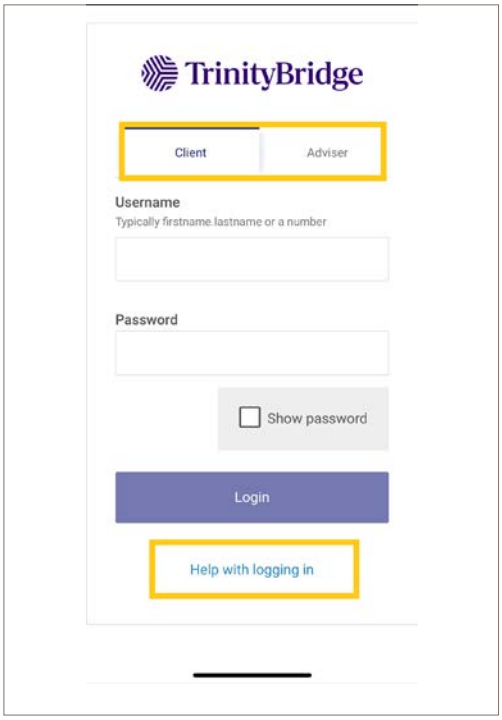
3. If you are a client, enter your usual username and password on the 'client' tab of the login screen.

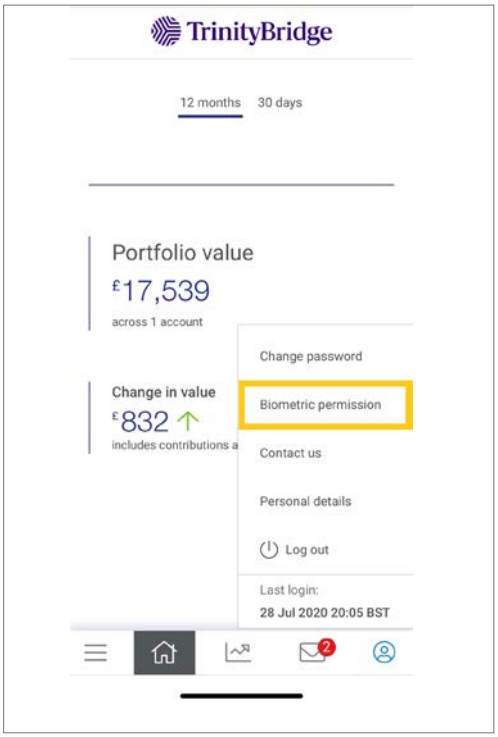
4. If you are an adviser, enter your credentials on the 'adviser' login tab.

5. Enter the characters of your memorable word as requested.

6. Your username and password will now be associated with any biometric details set up on your device.

What should I do if I can't remember my username or password?
Tap on 'help logging in' on the login screen. This should take you to our website where you can select 'forgotten username?' or 'forgotten password?' as appropriate.





Biometric login has stopped working, how do I set it up again?
1. Login to the App using your username and password.

2. Enter the characters of your memorable word as requested

3. Tap on the 'My Account' icon and select 'Biometric permission' from the menu.

4. Tap 'Grant permission to login via biometric check'.

5. Tap 'Save'.

I've been logged out, how do I login again using my biometric details?
1. On the Login screen, tap on 'Login using biometrics'.

2. You should be prompted by the device to use your biometric details.

3. Enter the characters of your memorable word as requested.

How do I disable biometric login?
1. After logging in to the App, tap on the 'My Account' icon and select 'Biometric permission' from the menu.

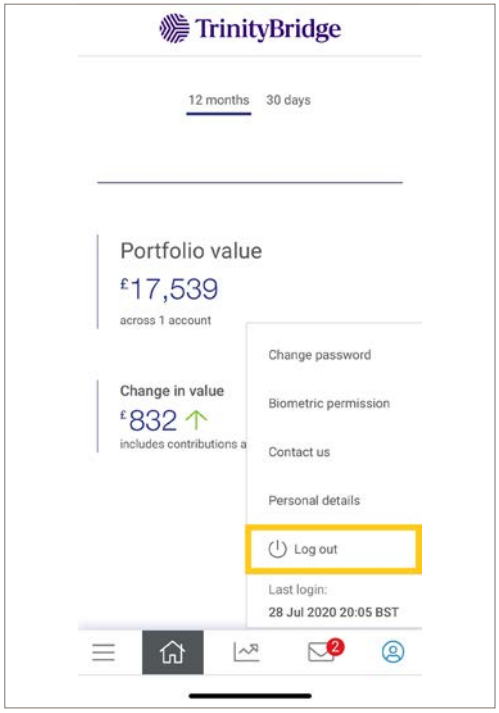
2. De-select 'Grant permission to login via biometric check'.

3. Tap 'Save'.

4. Your username and password will no longer be associated with any biometric details set up on your device.

Multiple people are set up with biometric details on my device, how do I prevent these users accessing the App?
Even when using biometric login, you will still be prompted to enter characters from your memorable word to gain full access to your account. If you have concerns about someone who is set up with biometric details on your device accessing your account information we suggest disabling the feature by following the instructions above.

How do I log out of the App?
Tap on the 'My Account' icon and select 'Log out'. Alternatively, closing down the App will also log you out.



Why can I not login to online portal on my PC and the App at the same time?
A security feature currently prevents concurrent logins using the same credentials. Logging in on a different device will end your session on the other device.

I have been locked out of my account, how do I gain access?
If you have entered an incorrect password or memorable characters too many times then your online account will be disabled.

Please follow the 'Help logging in' link for instructions on how to resolve this or contact the Investor Support Team. To prevent being locked out you can use the 'Help logging in' link to request username or password reminders.

I am entering the correct username and password but I still get an error saying that my username or password is incorrect.
Ensure you have selected 'Client' or 'Adviser' as tab on the login screen as appropriate - only TrinityBridge advisers will be able to login using this tab.

What does the Adviser option do on the login screen?
The Adviser option is for TrinityBridge advisers to manage their client's accounts.

Technical Support and Troubleshooting

Devices supported

What Apple and Android devices can I install the App on?
The App is available on Apple iPhones, iPod Touch and iPads running iOS 10 or later. It will also be available for Android mobile and tablet devices running Android 9 (Pie) or later.

Who do I contact for technical support?
If you encounter any technical problems or are having difficulties using the App, please contact our Investor Support Team. To find our contact details tap on the 'My Account' icon in the App and select 'Contact us'. Alternatively, our contact details can be found on our website.

General use

Can I see and do everything in the App that I can do on the portal?
Not right now. Currently, the App is a 'view only' snapshot of your portfolios, giving you access to view your online account on-the-go at your convenience.

Any there any differences in the way valuations are priced on the App?
Your online portal Summary screen and App Home screen will be accurate as at the date shown and will reflect all traded positions. Prices are quoted as at close of business on the valuation date. If the valuation date falls on a non-business day, the prices quoted will be those as at the close of business on the last business day before the valuation date.

Your App Home screen and online portal Summary screen will default today's date – any date you select in the past will be accurate as at close of business on that date.

Will I be able to see all accounts on the App that I can see on the portal?
Yes, you will be able to see the same portfolios on the App that you can when using the online portal, including any linked accounts.

My Account

Can I change my password using the App?
Yes. This also will change your password for the web version of the online portal.

My personal details are incorrect how do I update this information?
Please contact the Investor Support Team to update your details. To find our contact details tap on the 'My Account' icon and select 'Contact us'.

Support:

If you require any assistance installing, accessing or using the App, contact the Investor Support Team on **0800 014 2712** or email them **investorsupport@trinitybridge.com**

Telephone calls may be recorded.



Important Information

TrinityBridge is a trading name of TrinityBridge Limited (registered in England and Wales under company number 01644127) and TrinityBridge Fund Management Limited (registered in England and Wales under company number 02998803). Both companies are authorised and regulated by the Financial Conduct Authority. Registered office: Wigmore Yard, 42 Wigmore Street, London, W1U 2RY.

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TBR6085. September 2026.