

# Corporate Actions – How to make an election

## One

From the Platform Dashboard open Corporate Actions by selecting and clicking on the **Corporate Actions** icon.



## Two

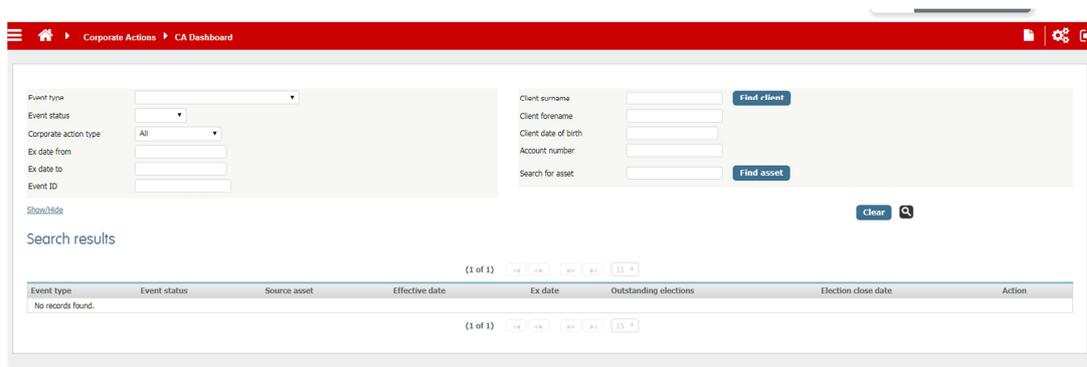
One opened you'll see Corporate Actions contains three icons. Select the **CA Dashboard** icon.



**Tip:** From the central search bar type "CA Dashboard". The search result list that appears will include a direct link to the Corporate Action Dashboard.

## Three

Type in the **Event ID** for the Corporate Action you wish to make an election on and click on the looking glass next to the "clear" button.



## Four

From the list that appears select **View eligible accounts** from the right hand menu before clicking on the Event type, in this case Redemption Opportunity.

Search results

(1 of 1) [Navigation icons]

Event type	Event status	Source asset	Effective date	Ex date	Outstanding elections	Election close date	Action
Redemption Opportunity	Open	GB0005794036	16/04/2018	13/04/2018	1	10/04/2018	View outstanding e ▼

(1 of 1) [Navigation icons]

- View outstanding e ▼
- View eligible accounts

## Five

Identify the client you wish to make the election for and select the **Election option**, **Instructor**, **Outturn option** and **Percentage of units** before selecting submit.

Documents available: None

Corporate actions online election

Event identifier: 100000109    Event type: Redemption Opportunity    Source asset: Mercantile Investment Trust (The) Plc Ordinary Sha (GB00005794036)  
Entitlement date: 12/04/2018    Effective date: 16/04/2018    Participation: Voluntary  
Election close date: 10/04/2018

[Refresh] [Back] [Submit]

Show/Hide outturn details

Election option	Default	Receipt per share	Target asset	Source ratio	Target ratio	Product availability
Redemption Opportunity for £1.55 per share		£1.550000	-	-	-	

(1 of 1) [Navigation icons]

Client name	Account	Basic entitlement	Maximum participation	Eligible Holding (GB0005794036)	Election option	Instructor	Outturn option	Percentage of units	Number of units Elected
Lean, Claudia	A10020350	204	204	204	Participant ▼	Mrs Lean, Claudia ▼	Redemption Oppar ▼	100	

## Six

You will now receive a message stating that the election for this account has been created

Election created for the account A10020350.

Show/Hide

Search results

(1 of 1) [Navigation icons]

Event type	Event status	Source asset	Effective date	Ex date	Outstanding elections	Election close date	Action
Redemption Opportunity	Open	GB0005794036	16/04/2018	13/04/2018	0	10/04/2018	View outstanding e ▼