



User Guide

ASIC Regulatory Portal

How to connect to an entity

Version 1.1



ASIC

Australian Securities & Investments Commission

How to connect to an entity



What is an entity?

An entity is a way of describing all the different ways through which business can be conducted – it could be an organisation structure like a company, a business, a partnership or a trust, or an individual (or 'natural person').

How do I connect my portal account to an entity or multiple entities?

To connect to an entity, you must either have an existing role within or for that entity. A person that has Senior administrator or Administrator Access level within the portal for an entity may also invite you via email to connect. An invitation to connect to an entity will include an invitation key.

If you don't already have a portal account and you have received an invitation to connect to an entity, you need to use the invitation key and personal details to register for the portal and connect to the entity at the same time. Click Register from the ASIC Regulatory Portal homepage and select the I want to accept an invitation from a portal user tile to complete registration.

1. Log in to the **ASIC Regulatory Portal** – <https://regulatoryportal.asic.gov.au/>
2. This will open the Select entity page which will list all your current connections (including yourself). Click **Connect to an entity**.

3. Select the **tile** that best matches why you are connecting to an entity.

Select a tile to start.

The table below shows when to select which tile:

Tile	When to select	Information you will need to provide when registering for the portal
I want to accept an invitation from a portal user	You have received an email inviting you to connect to an entity on the portal.	Must provide Invitation key If you are connecting as part of registering for the portal you must also provide: Personal details
I want to connect to a licence or registration I hold	You currently hold and want to connect to a professional licence or registration you have with ASIC, including: Australian Financial Services licence Australian Credit licence Registered Company Auditor registration Authorised Audit Company registration Self-Managed Superannuation Fund Auditor registration Liquidator registration	Must provide Licence or registration type Licence or registration number May be required to provide depending on who you are ASIC Key
I want to act on behalf of a registered company or body	You are an officeholder or equivalent and want to connect to the registered company or body that you represent: Australian Registered Company Registered Foreign Company Australian Registrable Body Partnership Trustee (Multiple) Other	Must provide Entity type May be required to provide depending on who you are ASIC identifier Corporate key ASIC key ABN Capacity Registration number
I want to connect to an entity using an industry funding security key	You have received an industry funding letter requesting you to connect to an entity on the portal.	Must provide Industry funding security key May be required to provide depending on who you are ASIC identifier Capacity Registration number ACN or ABN Entity type

4. Enter the **identifying information** for the entity you wish to connect to



The identifying information you provide will depend on the tile you selected. Mandatory fields are marked with a red asterisk *

We will verify the identifying information against our records

If you hold a professional licence or registration with ASIC or are a registered company officeholder, we need to verify the name you used to register for the portal against the name we have on our records.

If the name you used to create your account does not match our records, you will not be able to connect to the licence, registration or entity. You should check your own records to confirm what name you have used or go to ASIC Connect's register search – www.asicconnect.asic.gov.au

If the name used to create your portal account does not match the name on our records, select the checkbox as shown below:



The name used to create my portal account does not match the name on ASIC's records for this professional licence, registration or entity.

5. Click **Connect**



Once you have connected to an entity, you are now ready to act on behalf of the entity in the portal.

If you are viewing or have selected an entity to represent in the portal, and you want to switch entities or connect to another entity click **Connect to another entity** in the middle of the banner. This will take you to the **Connect to an entity, licence or registration page**.

Repeat from step 3 above to connect to another entity.

