



How to connect to an entity

ASIC Regulatory Portal user guide | Version 1.2, March 2024



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 who has a Senior administrator or Administrator Access level within the portal for an entity may also invite you via the portal to connect. An invitation to connect to an entity is issued via email and 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. For more information, see our [How to register](#) user guide.

1. Log in to the [ASIC Regulatory Portal](#).
2. This will open the Select entity page, which will list all your current connections (including yourself). Click **Connect to an entity**.

Who would you like to represent?

Select an entity from the list below or click '+ Connect to an entity' to add another entity.

+ Connect to an entity

Current connections

Entity name	Entity type	ASIC identifier
Shane Ross (Myself)	Individual	
Brody Jenner	Individual	
TEST COMPANY PTY LTD	Australian registered company	003070120

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

Select a tile to connect.

I want to connect to an entity using an industry funding security key

I have an industry funding security key

I want to accept an invitation from a portal user

I want to register using my invitation key

I want to connect to a licence or registration I hold

I'm a credit or financial services licensee, auditor or liquidator

I want to act on behalf of a registered company or body

I'm an officeholder or equivalent

The table below shows when to select which file:

Table 1: Further information about files

Tile	When to select	Information you will need to provide when registering for the portal
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.	<p>Must provide:</p> <ul style="list-style-type: none"> Industry funding security key. <p>May be required to provide, depending on who you are:</p> <ul style="list-style-type: none"> ASIC identifier; capacity; registration number; Australian Company Number (ACN) or Australian Business Number (ABN); and entity type.
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.	<p>Must provide:</p> <ul style="list-style-type: none"> Invitation key.

Tile	When to select	Information you will need to provide when registering for the portal
I want to connect to a licence or registration I hold	<p>You currently hold and want to connect to a professional licence or registration you have with ASIC, including:</p> <ul style="list-style-type: none"> • Australian financial services (AFS) licence; • Australian credit licence; • registered company auditor registration; • authorised audit company registration; • self-managed superannuation fund (SMSF) auditor registration; or • liquidator registration. 	<p>Must provide:</p> <ul style="list-style-type: none"> • licence or registration type; and • licence or registration number. <p>May be required to provide, depending on who you are:</p> <ul style="list-style-type: none"> • ASIC Key.
I want to act on behalf of a registered company or body	<p>You are an officeholder or equivalent and want to connect to the registered company or body that you represent. For example:</p> <ul style="list-style-type: none"> • an Australian registered company; • a registered foreign company; • an Australian registrable body; • a partnership; or • a trustee (multiple). 	<p>Must provide:</p> <ul style="list-style-type: none"> • entity type. <p>May be required to provide, depending on who you are:</p> <ul style="list-style-type: none"> • ASIC identifier; • corporate key; • ASIC Key; • ABN; • capacity; and • registration number.
I just want to register	<p>You want to register and decide later what you want to do.</p> <p>For example, you may not currently hold any licences or registrations with ASIC, but you may want to apply for a professional licence or registration.</p>	<p>Must provide:</p> <ul style="list-style-type: none"> • personal details.

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 (*) and **will verify the identifying information against our records.**

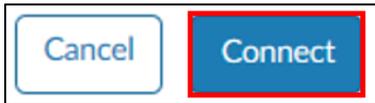
If you hold a professional licence or registration with ASIC or are a registered company officeholder, we need to verify the name you used to register for the portal against the name we have on our records.

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](#).

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**.



If you are viewing or have selected an entity to represent in the portal and want to switch entities, click **Switch entity** in the banner.



If you want to connect to another entity, click **Connect to another entity** in the banner.



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