

Personal Finance Portal

● — Giving you access to your finances 24/7 — ●



Welcome to your new Personal Finance Portal (PFP) – the revolutionary app that gives you access to view all your finances in one place 24/7 on any mobile or web device. PFP enables you to view your fund information and financial portfolio at the click of a button. So, whether you're looking for an up to-date valuation of your portfolio or want to assess how you're progressing against your goals, your new PFP has it covered.



A convenient way to view
finances online 24/7



Always up-to-date and
easy to use



Peace of mind that it's
completely secure



Accessible document
storage wherever and
whenever you
need to access it



The option to see all of
your advised and non-
advised finances in one
place



Opportunity to set up alerts
and insights within the
Personal Finance Portal

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21st century services

We recognise that advances in technology mean our clients are increasingly choosing to interact with us across multiple channels; face to face, on the telephone and online. That's why we're introducing our new Personal Finance Portal, a revolutionary new app that enables you to see your complete financial picture in seconds at a time and place to suit you.



Peace of mind of bank-level security

What's more, everything is completely encrypted, meaning that you can communicate with us using the inbuilt messaging service safely and securely.



A convenient way to view finances at the click of a button

Accessible online 24/7 across desktops, laptops and mobile devices including a progressive web app, Personal Finance Portal gives you access to your long-term savings and investment information in an easy to use, online format. And with the addition of other benefits, you can combine this with your short-term finances, such as bank accounts, savings and credit cards, to see a complete picture of where you stand financially.



Accessible document storage that's second to none

Your Personal Finance Portal allows you to house all your documents, both financial and personal, in a single online document vault that's completely secure and fully backed up. It's far more secure than keeping paper copies in your filing cabinet or in a computer file which can be hacked.



Always up-to-date and easy to use

Accounts, transactions and balances are refreshed every day, so the information displayed in your Personal Finance Portal will always be up to date* and it's displayed in a visually engaging way that's easy to understand. Because your Personal Finance Portal is cloud-based, getting up-to-date valuations becomes a breeze so you can always see how your investments are performing. *where applicable



Personal Finance Portal additional benefits

With the additional benefits, you'll be able to pre-set savings goals and set alerts to let you know whether you're on track or need to address a shortfall. Plus, there is a progressive web app available from any mobile device, simply add the link below into your mobile browser and click the "Get the app" button and follow the instructions.

Register for your PFP account today by visiting: <https://forresterboydwealth.mypfp.co.uk>

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