

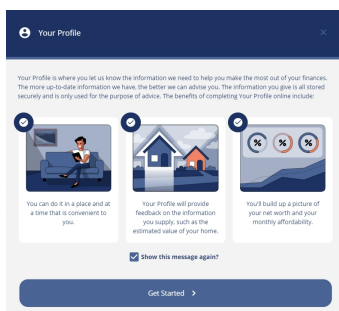
Welcome to the ● — Personal Finance Portal — ●



Why use our secure portal?

The Personal Finance Portal (PFP) is a fully encrypted secure portal which we will use to communicate via secure messaging with you from now on, we will be able to securely share documents (and you can too) and keep your personal details up to date.

Next steps



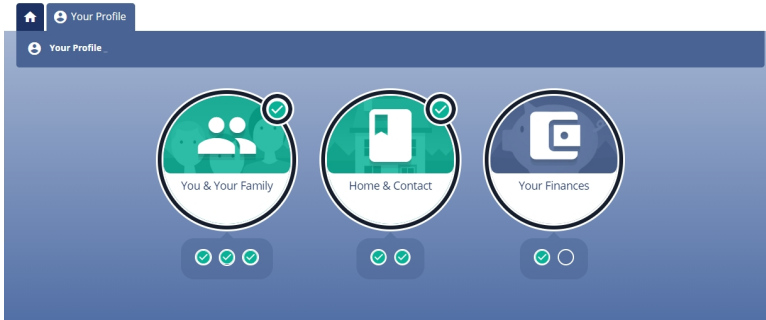
Firstly, navigate to your profile widget and ensure all your details are either added or reviewed, you will need to go through the full journey in the first instance so please ensure you have the following to hand:

- National Insurance number
- Employment details
- Plan or policy numbers (If you wish to add these)
- Income and expenditure information

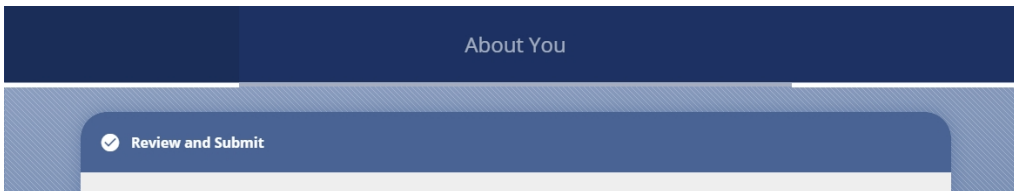
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Complete your profile



The profile section is divided into sub sections, starting with questions about yourself, once these are complete the next section will become available for you to answer and so on. Please pay special attention to the review pages in each section to ensure all questions have been answered as failing to answer just one question could result in the next section not becoming available.

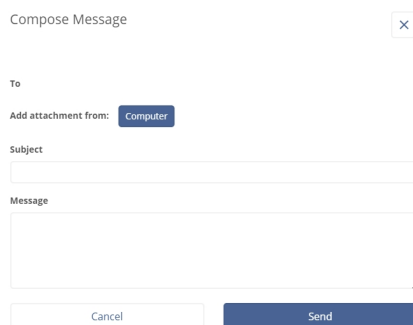


Once you have been through the journey (please do not worry if you have already given the information as it will populate as you go through and only takes approximately 10 – 15 minutes) you will be able to access any part of the profile as and when you want/need to.

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How to communicate securely

You can make contact via the secure messaging tool, click on the Contact button.



Compose Message ×

To

Add attachment from: Computer

Subject

Message

Cancel Send

Add the subject and the body of the message and hit send. It is that easy! We will be alerted once you have sent your message and likewise you will be emailed a notification when we respond. You will be able to see all sent and received messages as these are always available to you within the Messages widget.



How to share documents and view documents shared with you

Within the documents widget you will see two tabs, the first one is your documents. Here is where you can upload and share any documents directly with us.

The second tab (Adviser Documents) will house any documents we have shared with you and again this will generate an emailed notification to you, these documents will be available for you to access at any time.

