

Welcome to your new

Personal Finance Portal

Personal Finance Portal (PFP) is our revolutionary online financial management hub that gives you access to view your long-term savings and investment information all in one place 24/7 – anywhere, on any mobile or web device.

So whether you're looking for an up-to-date valuation of your portfolio, want to assess how you're progressing against your goals or simply wish to get in touch safely and securely, PFP has it covered.

What's more, PFP Premium now gives you the ability to collate information on your short-term finances like bank account(s), credit cards, loans and mortgages, together with your advised products, giving you powerful insight into your total net worth. Plus, you'll also be able to receive alerts and insights into spending and saving habits so you can keep track on how you're progressing against the goals you've set.

Activate your account today!

Activating your account couldn't be simpler.

1. Simply go to the [PFP registration page](#) and click the 'Register' button.
2. You'll then be prompted to enter your email address, that's the one that we hold on file, which in turn will trigger an email containing an activation link to be sent to your email account. Note: your email address is your username for logging into PFP.
1. Upon receipt of the email, click on the activation link.
2. You'll now be directed to a page to verify your identity, define a password and view the Terms and Conditions. Once you have done this, click on the 'Register' button to complete the activation of your PFP account.
3. The activation process is now complete! You'll receive an on screen confirmation message saying 'Activation process complete' and a link to login to your PFP account.

Logging into your PFP account

You can now login into your PFP account simply by going to the [PFP login page](#) and entering your email address, that's the one you entered upon registration, & password.

PFP's features

Upon logging into your PFP account, you'll be directed to your 'Overview' page which provides details of your:

- Assets & Liabilities
- Income & Expenditure
- Insights
- Account Categories
- And Goals



In addition, there are further links available along the top right hand corner of the overview page. These include:

- Tasks
- Documents
- Secure Messages
- Your Profile
- Plus further links to the Goals and Insights categories

Asset and Liabilities

The 'Assets and Liabilities' area provides you with an easy to understand overview of your total assets and liabilities that have been recorded with us.

You can also view individual plan information simply by selecting the applicable account category followed by the down-arrow to the right of the plan you wish to view. Other options include filtering results by time period, owner, as well as being able to change the way the results are displayed, with both line graph and pie chart options available.



Income and Expenditure

The 'Income and Expenditure' area provides you with real-time visuals of where your money goes – great for enabling effective cash flow management and budgeting.

It includes the balance history of your current accounts, savings accounts & credit cards that are imported via the PFP Premium feature [\[should you have access to this\]](#).

You can review your individual spending on a month-by-month basis by selecting from the spending areas listed underneath the graph and as with the 'Assets and Liabilities' graph, you can filter the results shown by account type, compare balance history from previous months, as well change the way the results are displayed, with both bar graph and pie chart options available.



Account Categories

This area shows your net worth broken down by account category. It includes a mixture of your long-term investments and pensions, [\[together with your short-term finances\]](#). Each category can be explored further so you can review the performance of the particular accounts contained within it and you can also add a new account or policy by simply clicking the 'Add New Account or Policy' button.

Tasks

The 'Tasks' area provides you with an overview of any tasks we have undertaken to perform on your behalf. Simply click on a task to review the details.

Account Categories	
Assets	
Current Accounts	£2,002
Savings	£4,000
Investments	£23,883
Pensions	£78,000
Property	£298,750
Protection	>
Liabilities	
Credit Cards	£921
Mortgages	£274,128
Loans	£3,997

Documents

PFP provides you with a secure document vault, so you house all your financial documents online where they are secure and backed up.

Uploading is simple and straightforward. Simply select the 'Upload Document' icon, attach the document and select 'Upload'.

Equally to view and download documents select the 'Download Documents' icon against the individual file and the document will download.

Goals

The 'Goals' area in PFP is great if you would like to setup savings and investments goals and receive alerts on whether you're on track or need to address a shortfall.

To add or edit a goal simply select 'Edit Goal' followed by 'Goal Complete' when you're finished.

Goals				
★	Holiday	Target Date: 01/09/13	Target: £500 Actual: £350	>
★	New Shoes	Target Date: 01/09/13	Target: £500 Actual: £0	>
★	Holiday	Target Date: 01/09/13	Target: £500 Actual: £0	>

Insights

The 'Insights' area is situated on the 'Overview' page and provides you with regular updates including your current net worth.

Secure Messages

PFP provides you with secure messaging, giving you a quick and convenient way to exchange personal information online with us at the touch of a button.

Accessing and sending messages is simple. Just go to the 'Secure Messages' area where you'll be able to view all the messages you have received.

Sending messages is equally simple. Just click 'Compose a new message' and press 'Send' when complete.

Your Profile

The 'Your Profile' section enables you to update your basic information, edit and configure the insights you receive together with activating and cancelling membership to PFP Premium benefits.

