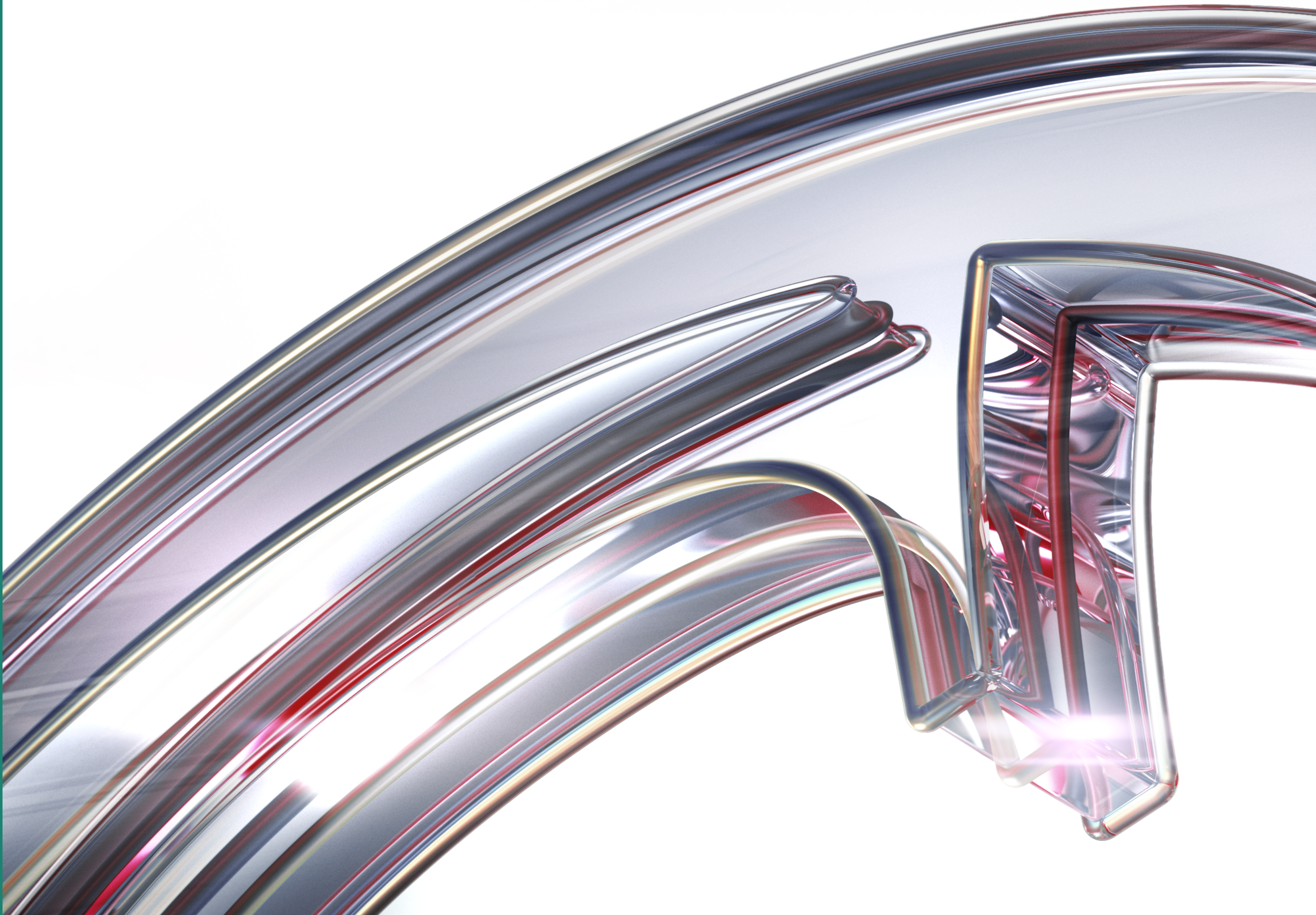
COURTIERS

PFP

Personal Finance Portal

Features Overview



Understand the benefits of a simple, proven and comprehensive portal, providing a clear view of your finances.

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About You

Your world – a clearer financial perspective.

You, your family and your work

Manage your personal profile directly via your portal. Add family members and your employment information.

Your home and contact details

Add current address details and any previous addresses.

Keep phone numbers and email addresses up to date.

Your combined net worth

Record all your assets, liabilities, income and expenditure in one place.

Keeping you closely aligned with your investments

We'll only use your profile information to manage your wealth as effectively as possible. All information you provide is stored securely on our systems and whenever you update it, we'll be informed too – saving you having to tell your story twice.

Your Investment Portfolio

A quick snapshot or time to drill down deeper.

View a summary of your personal or joint assets and liabilities – anytime, anywhere...

- Savings
- Investments
- Property & Valuables
- Current Accounts
- Liabilities

...and look more closely with a Full Financial X-Ray.

- Your net worth over time
- Line & bar charts
- Analyse fund performance
- See asset allocation
- View fund factsheets

Linking Your Assets and Liabilities

All your account information in one place.

Understand open banking

What is open banking? Is it regulated? What are the benefits? What information can you see and who else can see it? Learn more in your Linked Accounts area.

Link your assets and liabilities

Manually or automatically link* property and other valuable assets, savings accounts, investments, current accounts, pensions, annuities, mortgages, credit cards, loans and equity releases.

All side by side

See the combined value of your investments, linked assets and liabilities. Consider your goals with a more collective view of your total net worth.

** Your provider needs open banking capability enabled for any assets or liabilities to link automatically. If it's not enabled, you can manually link and update the information in your PFP.*

Secure Messaging

Comfortably away from a busy inbox.

Focused

File and record important correspondence about your investments – much easier and secure within your Personal Finance Portal.

Functional

Contact us directly from your dashboard, safely adding any attachments.

Informed

Whenever you get a new message, a notification's sent to your registered email address to let you know.

Document Vault

Your own confidential space for anything you like!

Your Document Vault offers two, well-balanced benefits:

Courtiers correspondence

All documents relating to your investments with Courtiers are recorded and shared here with you. Similarly you can choose to share documents here with us. Either way it's instant, paperless and all the information's secure.

Your personal area

Statements, invoices, quotes, holiday photos – a keep-it-safe photo of the new puppy, to look back on in years to come!

Store anything you like here – only you will see it. And you know it will be safe for as long as you need it.

Insights

Choose the updates your portal provides – and when.

Weekly, fortnightly or monthly?

Choose how often you'd like value and percentage change updates on your total net worth.

1%? 3%? 5%? 10%?

Stay up to date with investment and pension percentage changes, with updates every week, fortnight, month or quarter.

Up to Date

Stay aware of new tools and helpful features when they become available in your Personal Finance Portal.

Insights generated!

However often you choose to receive insights, they'll form a valuable part of your overall investment experience.

Additional Security

Optional and free – add Two-Factor Authentication

What is Two-Factor Authentication?

Two-Factor authentication (2FA) is a security feature that requires you to Authenticate your login each time with additional steps. It means that even if a third party acquires your login password, they won't be able to access your portal.

Using Two Factor-Authentication

To use 2FA you'll need an authenticator app for your smartphone. Free apps are available from various providers including **Google Authenticator**, **DUO Authenticator** or **Microsoft Authenticator**. While there are many other authenticator apps available, these are popular and don't cost money.

When you first access your Personal Finance Portal, you'll be asked to set up 2FA. Choose "*Get Started*" or "*Remind me in a week*" and, depending on your choice, the portal will guide you to complete 2FA setup or periodically offer you the option in future.

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