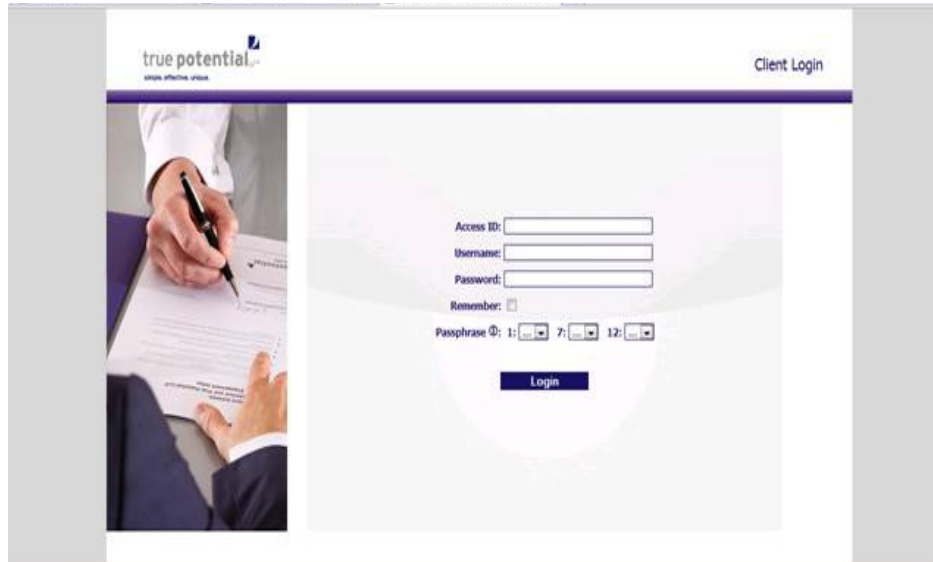


## Client Websites

The client website can be accessed two ways: via your adviser's site or via a direct link <https://clientsite.tpinside.com/>

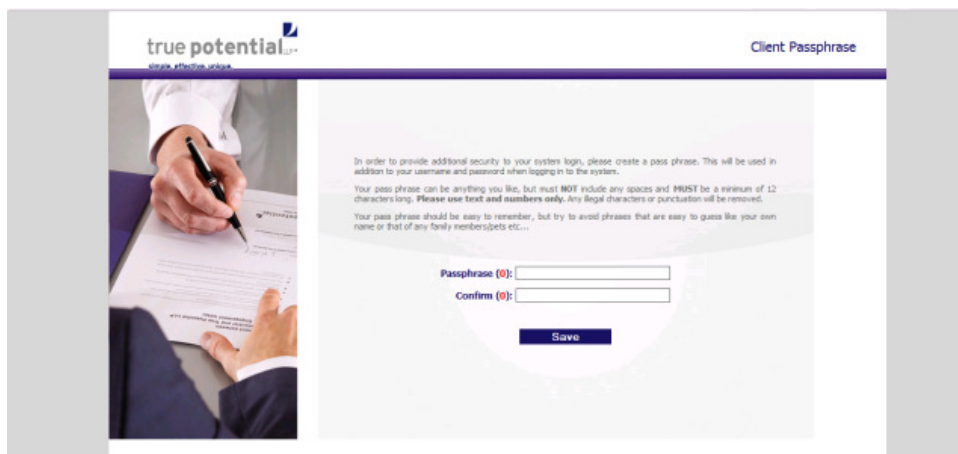
Both ways will display the following log in page to access your data.



The screenshot shows the 'Client Login' page for True Potential. The page features the True Potential logo at the top left and the text 'Client Login' at the top right. On the left side, there is a vertical image of a person in a white shirt and blue suit jacket writing on a document. The main content area contains a login form with the following fields: 'Access ID:' (text input), 'Username:' (text input), 'Password:' (password input), and a 'Remember:' checkbox. Below these is a 'Passphrase' section with three dropdown menus labeled '1:', '7:', and '12:'. A blue 'Login' button is positioned at the bottom of the form.

To log in to the client website you need 3 details, the firm ID, your username and your password. These are available through your adviser.

You will also require a passphrase. You set this up when you first visit the client website.



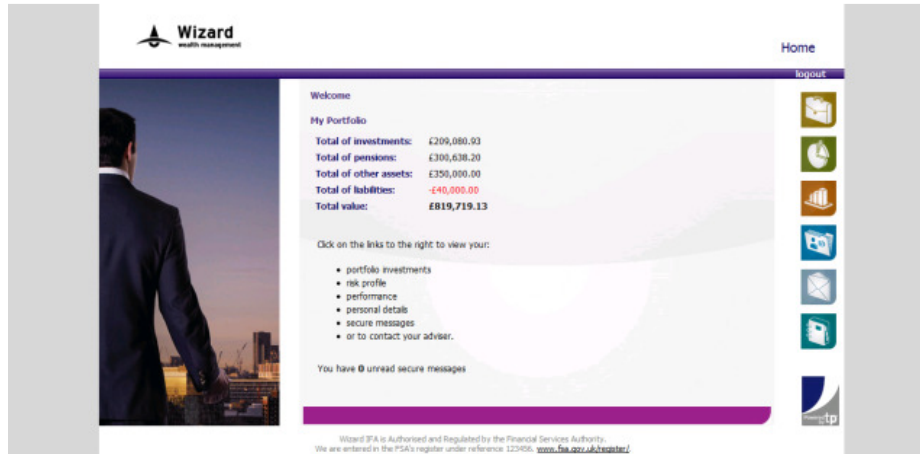
The screenshot shows the 'Client Passphrase' page for True Potential. The page features the True Potential logo at the top left and the text 'Client Passphrase' at the top right. On the left side, there is a vertical image of a person in a white shirt and blue suit jacket writing on a document. The main content area contains instructions for creating a passphrase: 'In order to provide additional security to your system login, please create a pass phrase. This will be used in addition to your username and password when logging in to the system. Your pass phrase can be anything you like, but must NOT include any spaces and MUST be a minimum of 12 characters long. Please use text and numbers only. Any illegal characters or punctuation will be removed. Your pass phrase should be easy to remember, but try to avoid phrases that are easy to guess like your own name or that of any family members/pets etc...'. Below the instructions are two text input fields labeled 'Passphrase (0):' and 'Confirm (0):'. A blue 'Save' button is positioned at the bottom of the form.







The first time you log on to the client website you will be required to enter a passphrase; this has to be 12 characters long and should be something easy to remember but secure.

If you forget your passphrase your adviser has the ability to reset your passphrase, this will allow you to set a new one.

## Welcome Screen

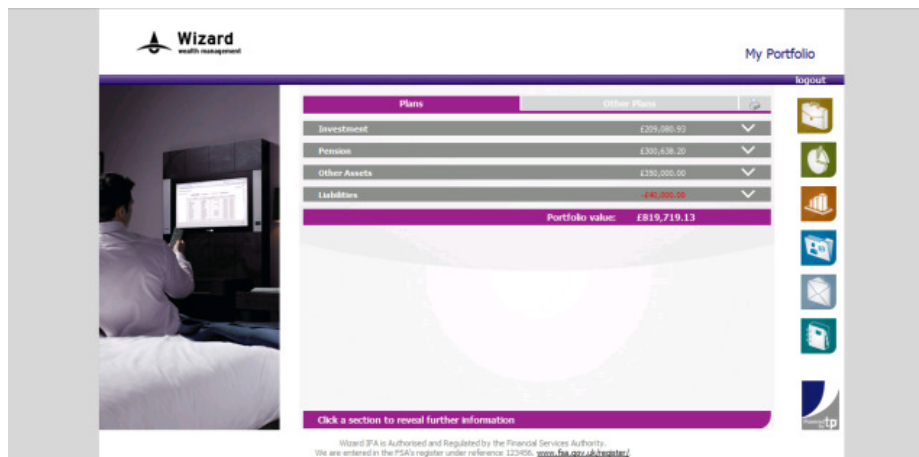
The first page you will see is the welcome screen. This contains a snap shot of your wealth and also a column of links on the right, which are explained in the following pages.



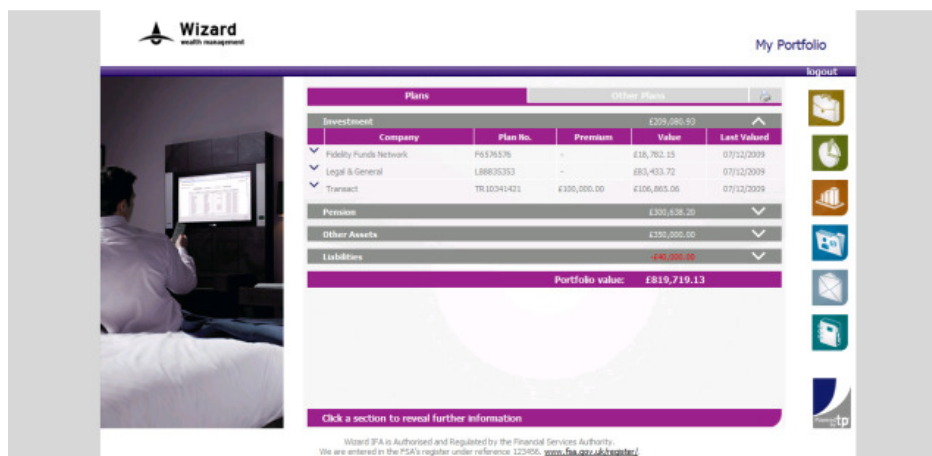
	<b>My Portfolio:</b> Displays a breakdown of your wealth
	<b>My Risk Profile:</b> Displays your Asset Allocation
	<b>My Performance:</b> Shows historical performance
	<b>My Personal Details:</b> Allows you update your personal fact find
	<b>My Secure Messages:</b> You can send encrypted messages adviser
	<b>My contact:</b> Contact details for your adviser

## My Portfolio

This section allows you to see more details about your policies. Each policy you own is separated into product type, investments, pensions, other assets and liabilities. The other policies tab includes life insurance, mortgages and mortgage related products and any general insurance products. Each of these product types shows a total amount (made up of the policies with that type) and can be examined in more detail by clicking on the small v icon to the right of the product type.



The expanded view shows what policies make up the total sum on the previous page, with more details on each policy. These can be examined in more detail by clicking on the small v icon to the right of the product type.



This page shows the underlying funds that make up this particular policy, along with more details about the particular fund.

NB. Values can be generated using Real time valuation or price feed. Please speak with your IFA to clarify the difference in these propositions

To navigate back to the top levels simply click the ^ next to the product type.



Policias Other Policias

Transact Wrap

Fund Name	Units	Price	Value
CP Ruffer European Inst	3278.8885	£3.3900	£10,993.81
First State Asia Pacific A	2049.3800	£5.2100	£10,681.15
Cazenove UK Dynamic X	6329.1139	£1.6900	£10,696.20
Invesco Pers High Income Inc	3751.3430	£2.8500	£10,634.33
Schroder Income Inc	1375.5560	£7.5200	£10,357.64
Baring Global Bond	9708.7380	£1.0600	£10,291.26
M&G Strategic Corporate Bond A Inc GBP	16946.1525	£0.6000	£10,169.49
Investec UK Special Situations Acc	9278.3510	£1.0900	£9,740.27
Goldstone US Growth Ret Acc	2218.9250	£3.7900	£8,409.76
JPM US Select I Acc	3571.4290	£2.3300	£8,321.40
StanLife Inv UK Property I	4945.4545	£0.9600	£4,763.64
BlackRock UK Absolute Alpha Acc	1428.5734	£1.4100	£2,014.29

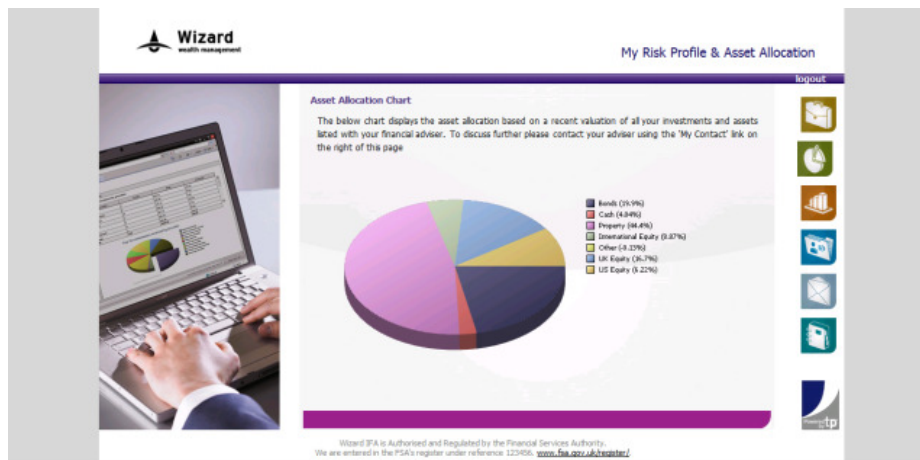
Click a fund to reveal further information

Wizard JFA is Authorized and Regulated by the Financial Services Authority.  
We are entered in the FSA's register under reference 122465. [www.fsa.gov.uk/register/](http://www.fsa.gov.uk/register/)



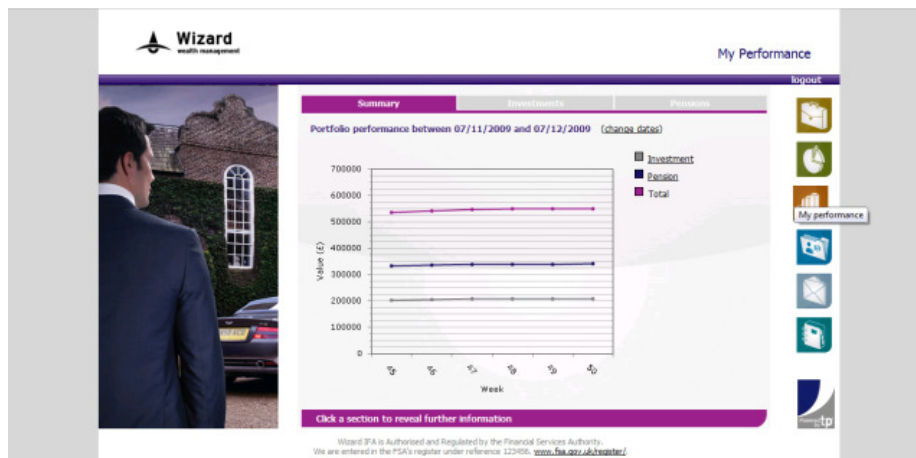
# My Risk Profile & Asset Allocation

This section shows you the % (percentage) breakdown of where your assets are held.

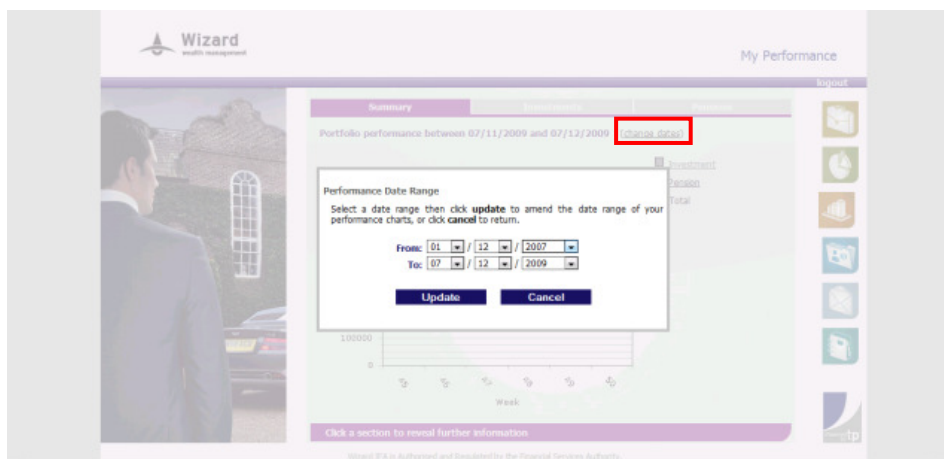


## My performance

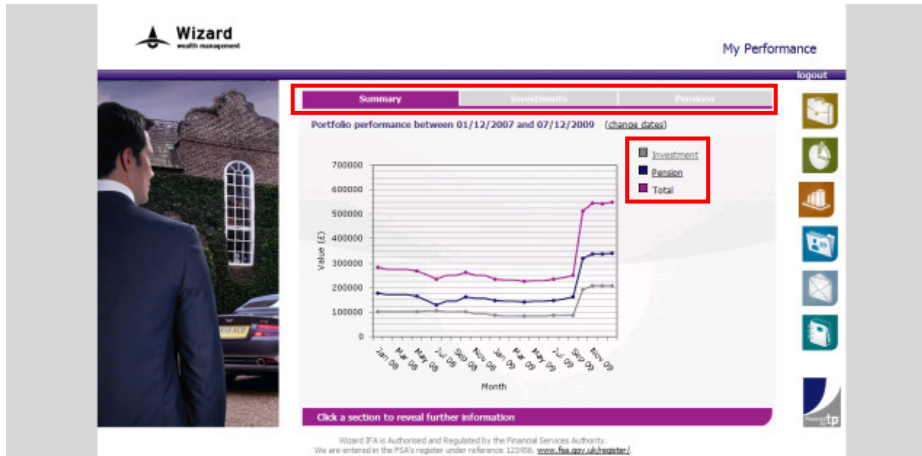
The my performance section shows you a historical breakdown of how your policies are performing.



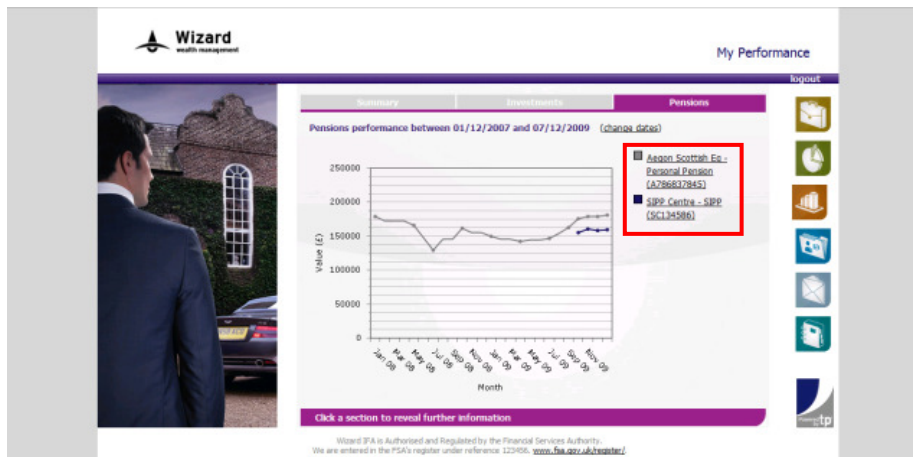
The date range of the performance chart can be changed to view a longer or shorter historical valuation, by selecting the change date option (highlighted in red below).



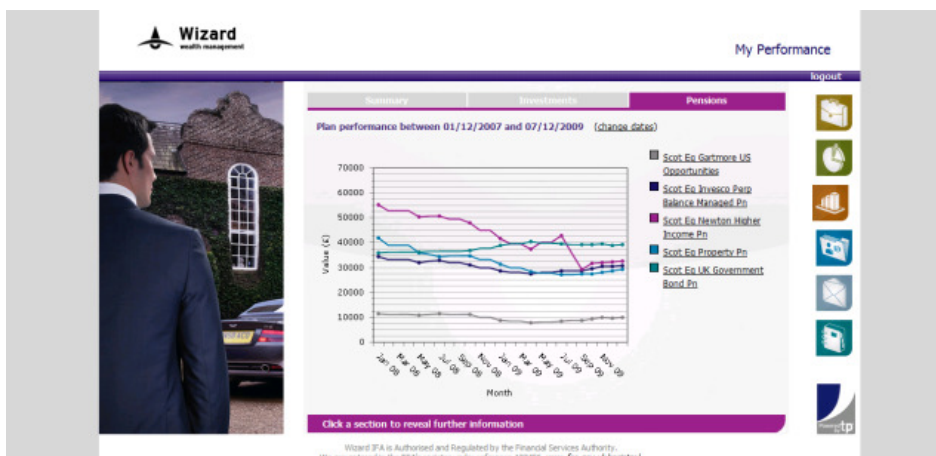
The date range of the graph will now change and will keep that date range for the duration of your visit. By clicking on one of the links on the right or across the top (highlighted in red) you can view greater detail on the policies within each product type category.



This will display how well each policy within each category are performing, you can see more information on the funds that make up that policy by clicking on the links to the right (highlighted in red)

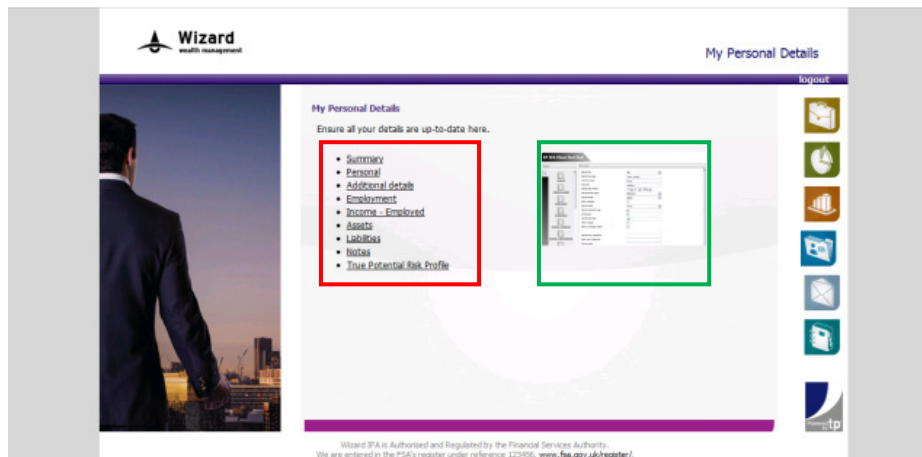


This will display how well each fund within each policy is performing,

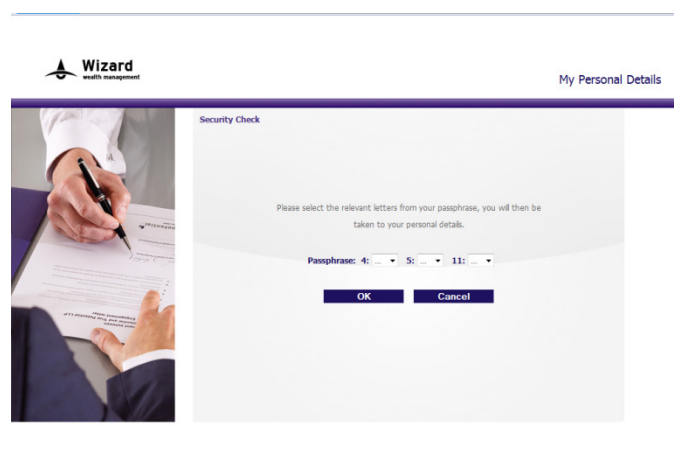


## My personal details

The my personal details allows you to enter new and update existing information on yourself. The quick links (highlighted in red) take you to a specific section to update. Clicking on the area marked in green will open a new tab/window and will allow you to enter greater information about yourself.



Clicking on the section marked in green will prompt you to re-enter your passphrase



Once the passphrase has been entered this will take you to a full fact find on yourself, where you can view any information your adviser has on yourself and update any information presented here.

**Wizard Wealth Management Client fact find**

Wizard wealth management

Pages

- Personal
- Additional details
- Dependants
- Employment
- Income - Employed
- Income - Self Employed
- Expenditure
- Assets
- Liabilities
- Life Assurance
- Income Protection
- Other Protection
- Investments
- Mortgages
- Mortgage Protection

Personal

Client's Title: Mr

Client's Forename: John Andrew

Client's Surname: Thompson

Salutation: John

Client's Date of Birth: 20 9 1960

Client's Marital Status: Married

Client's Gender: Male

Client is Smoker:

Client's Health: Good

Client's Retirement Age: 65

UK Resident:

Client's Birth Place: London

Client is Expat:

Client is a Foreign Citizen:

Client's Home Telephone: 01482778218

Client Work Telephone: 0207493110

Client's Mobile: 0798321210

Client's Email: JOHN@BTNET.COM

Letter Address Salutation: Mr J Thompson

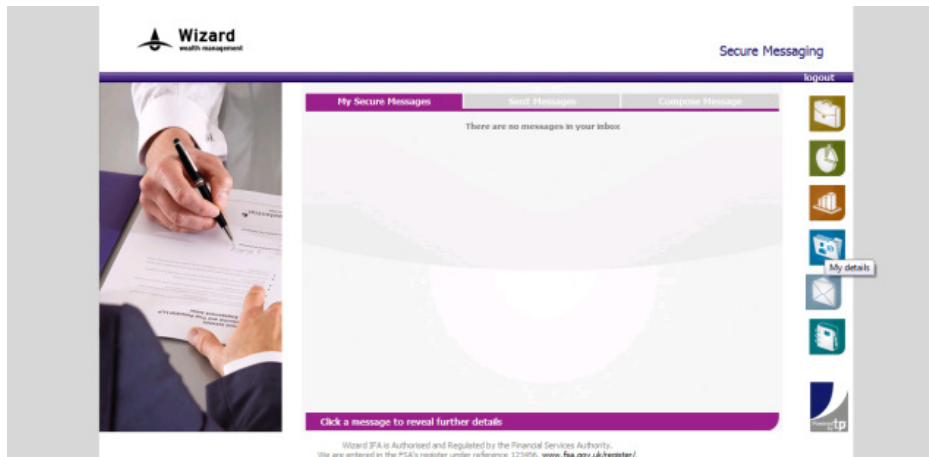
Home Address Line 1: Midhurst Cottage

Home Address Line 2: Fernden Lane

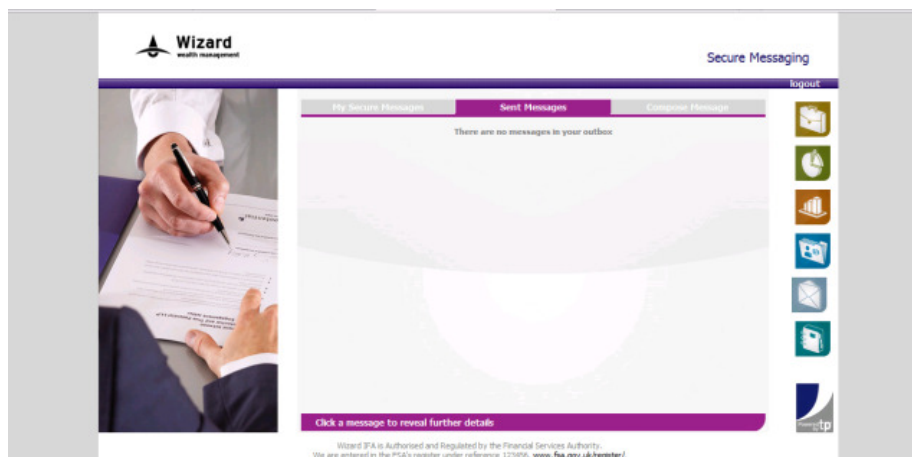
Home Address Line 3:

## My Secure Messages

This section allows you to securely message your adviser and vice-versa. The My Secure Messages tab allows you to see any secure messages you have been sent past and present.

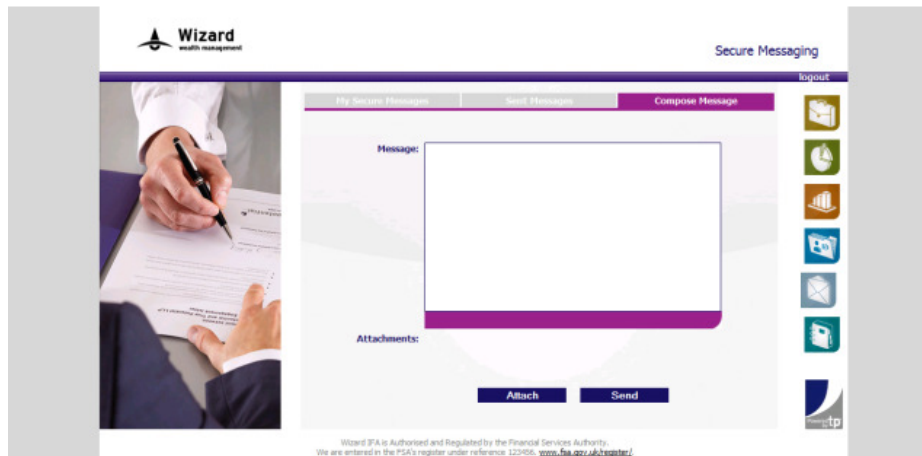


The sent messages tab allows you to see any message you have sent to the adviser.



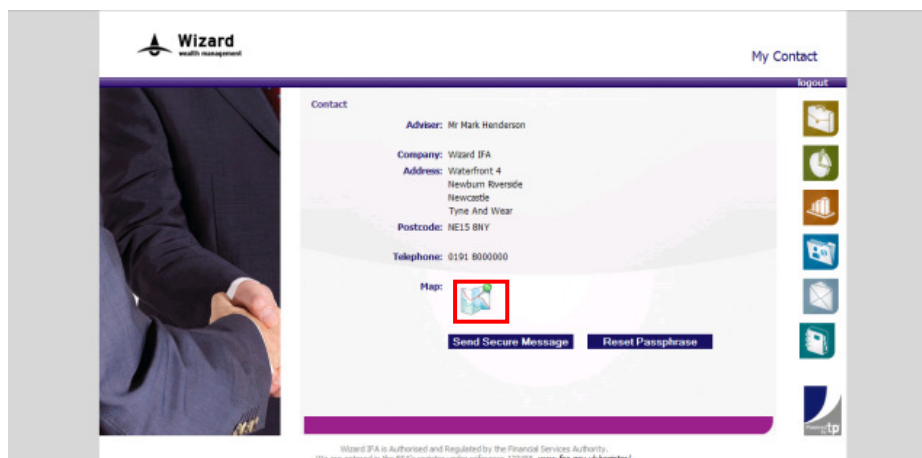
To send a message to the adviser, navigate to the Compose Message tab. In the message box you can compose a message just like an email. You can also attach any require documents (PDF's under 4mb) and send these to your adviser.

To send a message press send, this message will then be displayed within the advisers system, and also in your sent messages.



## My contact

The My Contact section allows you to see contact details on your adviser and also gives you a link to send a secure message. The map icon (displayed in red bellow), allows you to see a map of your advisers location.



The Reset passphrase button (marked in green above) allows you to reset your passphrase if you feel that you need to reset it.

