

A photograph of a middle-aged couple with grey hair, smiling and looking at a laptop screen. The man is on the left, wearing a grey shirt, and the woman is on the right, wearing a green sweater and glasses. They are in a bright, modern office setting.

YOUR Personal Finance Portal

Register for your online portal today –
making it quicker, easier and safer to view
your portfolio in real time, send and receive
messages, store documents and more.

Attivo®

Your Personal Finance Portal makes it easier, quicker and safer

The Personal Finance Portal (PFP) is another way Attivo makes managing your financial future, simpler.

As an Attivo client, you have free access to this secure, easy-to-use portal, designed to save you time, streamline communication and be better for the environment.

- **View fund information and your financial portfolio in an instant on any mobile or web device, 24/7.**

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 want to get in touch.

- **Secure messaging saves you time when communicating with your Financial Planner and our team.**

With email and post increasingly open to being intercepted, we take the security of the data you share with us extremely seriously. The portal's secure messaging service lets you quickly get in touch with us, and have peace of mind that any information you share is encrypted and completely private.

- **A secure document vault keeps everything in one easy-to-access place.**

You can store all your documents online (plans, policies and family Wills, for example). They'll be secure and fully backed up – much safer and more convenient than in a filing cabinet.

- **Upload and sign documents electronically via the portal.** No more time spent sending paperwork through the post.



- **Conveniently links with Open Banking.** Open Banking is a service that allows you to make your online banking data available to applications you use, such as the portal. Collating all your information from investments, bank accounts, credit cards, etc. can give you powerful insights.

- **Using the portal is simply better for the environment.** Streamlined messaging, electronic document signing and online storage will dramatically cut down on the amount of paper we use and help cut down our carbon footprint.

Still the personal service you can count on

Registering for the portal will not replace the relationship and face-to-face interactions you have with your Attivo Financial Planner. Register today for a simpler, faster and more secure way to manage your finances at **www.attivo.gb.pfp.net**

To register for the portal, we need to have your email address on file. It can't be the same email as your spouse or partner as it's what you'll use to log in to the portal. You can update your email address by contacting our Client Services team on **01242 585444** or **clientservices@attivo.co.uk**

5 quick steps to registering your Attivo Personal Finance Portal

Register in minutes for the easier, quicker and safer way to view your financial picture.

- 1 Visit **www.attivo.gb.pfp.net** and click the 'Register' button
- 2 Enter your email address and we'll send an activation link
- 3 When you receive the email, simply click on the link
- 4 You'll be directed to a page to verify your identity and choose a password
- 5 Click the 'Register' button and you'll get a link to log in to the portal

Get started today, register at
www.attivo.gb.pfp.net



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