Accessing Your Platform and Accounts

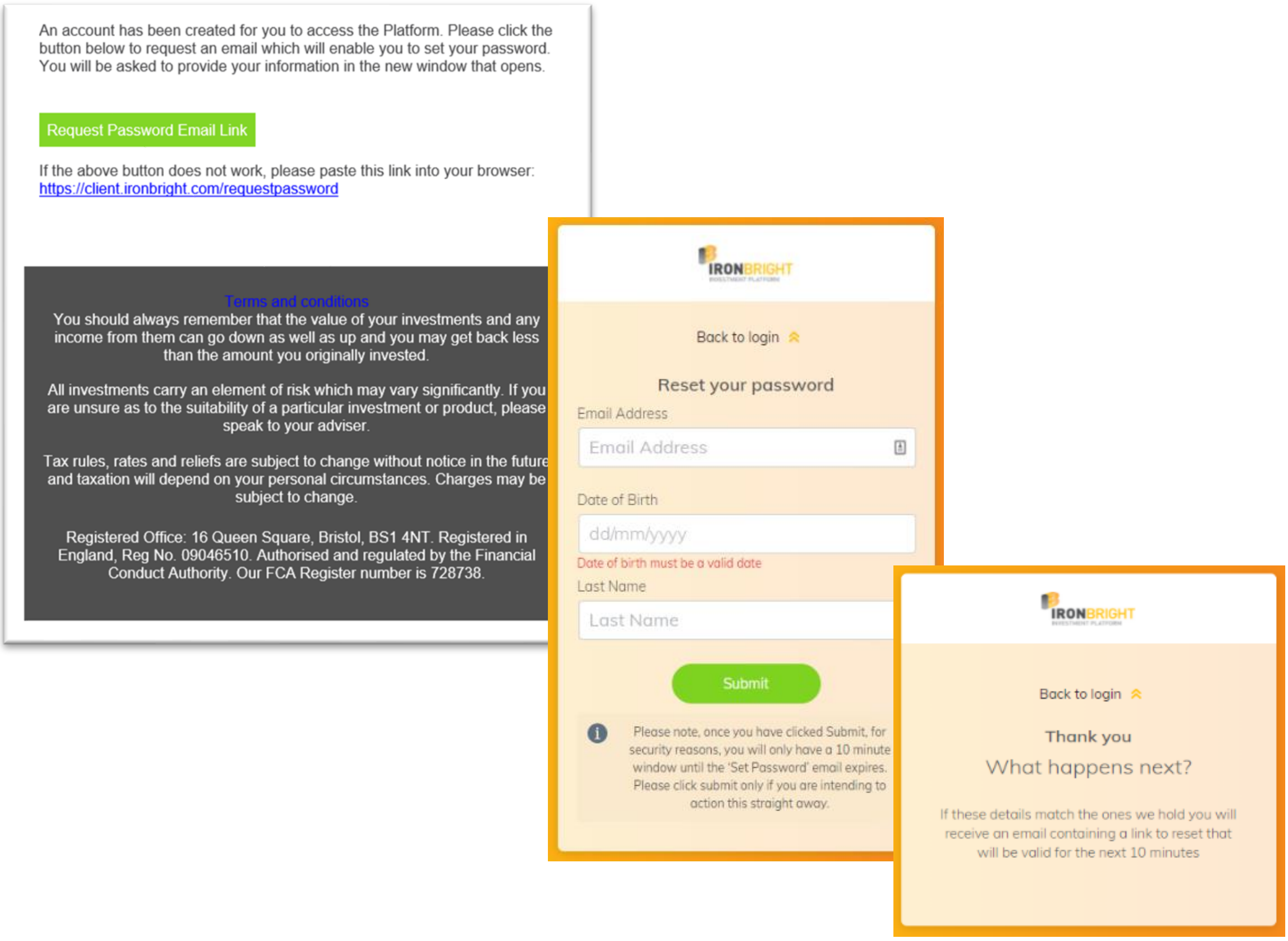
This guide is to give you a few helpful tips on navigating the new platform and your accounts

Logging in for the first time

1. You will receive an email from the platform team at IronBright confirming that your Account has been initiated by your Financial Adviser on the platform

2. You need to press the green button on the email, shown on the 1st screen to the right, which will take you to a new window in the platform. You will be asked to confirm some personal details, shown in the 2nd screen to the right.

3. Press the green Submit button and then you should get a confirmation screen saying, ‘Thank you’ and confirming what happens next.



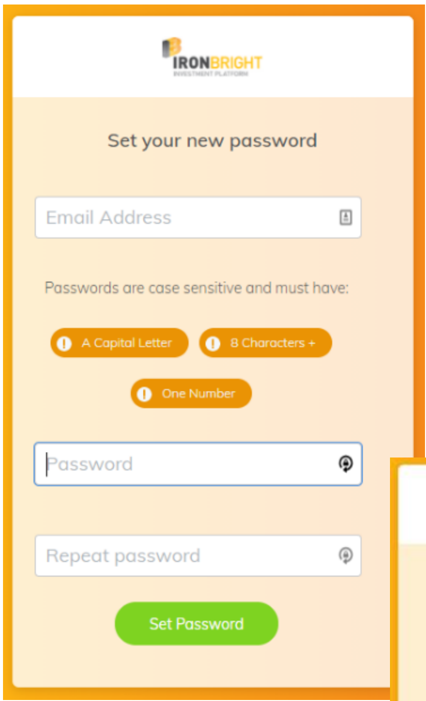
4. Once the system has matched your personal details, you will receive another email from the platform team asking you to create a password of your choice.

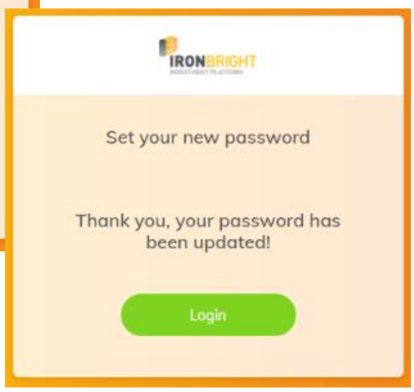
5. You need to follow the link on the email to set up your personal password, shown in the 4th screen to the right.

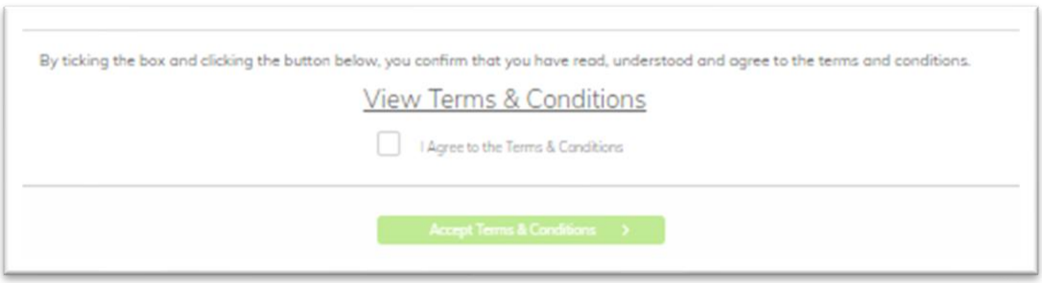
6. Ensure it is memorable to you but not easy to guess. Once you have pressed the 'set password' green button, you will receive the confirmation screen confirming your password re-set was successful.

7. You now need to press the green Login button. This will take you into the platform to allow you to check all of your personal details and accept the Terms & Conditions.

8. It is really important you do this as you will need to accept the Terms and Conditions that were sent to you from your Financial Adviser during the Advice Process. Until you do this, your Financial Adviser is not able to complete anything further on your account.







You are now ready to access your platform and view your individual account/s

Once you have your log in details you are able to access the platform which means you can see your individual accounts, values, investments and performance.

If you want to pay some money in, withdraw money or notice something that needs changing please contact your Financial Adviser, who will be able to help you.

Your Profile Details

This is all the personal information held about you on your platform account.

You are able to update some of this information yourself, but please confirm any changes you have made to your Financial Adviser too.

If you would prefer us to update anything for you, please confirm this with your Financial Adviser, who will pass any changes onto us

Document Library

For any documents regarding the platform or your investments please contact your Financial Adviser who will be able to help you. They will be able to direct you to the right place to obtain the right documents.

Your Message Hub

This is where we will communicate with you about all sorts of things.

Some messages will be regular and are produced as part of our regulatory requirement, this could include a quarterly valuation of you accounts.

You may also receive messages confirming contract notes are available, verifying that an investment has been completed or that something has been updated on your account.

If you are not sure about any of the messages you receive, please contact your Financial Adviser in the first instance. They are able to see the same as you.

Making sense of some of the Industry Terminology

In our industry, there can be terminology that can be confusing to some. Here are some terms you may see or hear

Platform: is simply a place to hold many of your accounts and investments that can be accessed securely on the internet.

Instruments: are the funds, shares, equities that your money is invested in.

Models: are a set of instruments that are grouped together for a particular purpose

Account: is the individual pot of money you hold, which could be a pension, ISA, GIA etc.

Contact

In the first instance you should contact your Financial Adviser who will be able to help you.

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