



# YOUR GUIDE TO THE PERSONAL FINANCE PORTAL



## WHAT IS THE PERSONAL FINANCE PORTAL?

The Personal Finance Portal (PFP) is a revolutionary way of viewing all your finances in one place at any time on a mobile or web device. Powered by the market-leading company in financial services software, Intelliflo, PFP allows you to view all your finances and your investments at the touch of a button.



### SECURE AND TESTED

Your information is securely stored using sophisticated encryption that has been thoroughly tested by leading providers.



### ONLINE VAULT

You can upload and store documents in a secure vault so that you can refer to them in the future. And your Consultant can share documents with you using this facility.



### REALTIME DATA

What you see in your PFP is a representation of the data your Consultant has captured so any information you update in the PFP will feed back to your Consultant in real-time. This allows your data to be as up-to-date as possible so that you and your Consultant can work simultaneously on tasks such as updating information for review meetings.



### BUDGETS

The Budget feature of your PFP enables you to monitor how your expenditure compares to pre-determined figures. You can adjust your budgets whenever you wish and watch how your expenditure matches any changes.



### ONE PLACE FOR ALL YOUR FINANCES

You can view all your finances in one place and all your Becketts plans will be automatically displayed.



### SECURE MESSAGING

The portal is an online space that enables you to send and receive messages with your Consultant. This is a safer way to communicate than emails which can be intercepted.



### INSIGHTS

You can gain valuable insights into different aspects of your finances such as your top expenses, changes in your net worth, updates to your portfolios, and how your investments are performing. These Insights are set-up by you so you have control over their frequency and level of detail.



### GOALS

You can use the Goals feature to track the progress of your success towards targets that you specify; for example, the amount of money you have invested in your pension or how much you have been able to repay from your mortgage.

## FREE PREMIUM ACCESS FOR BECKETTS CLIENTS

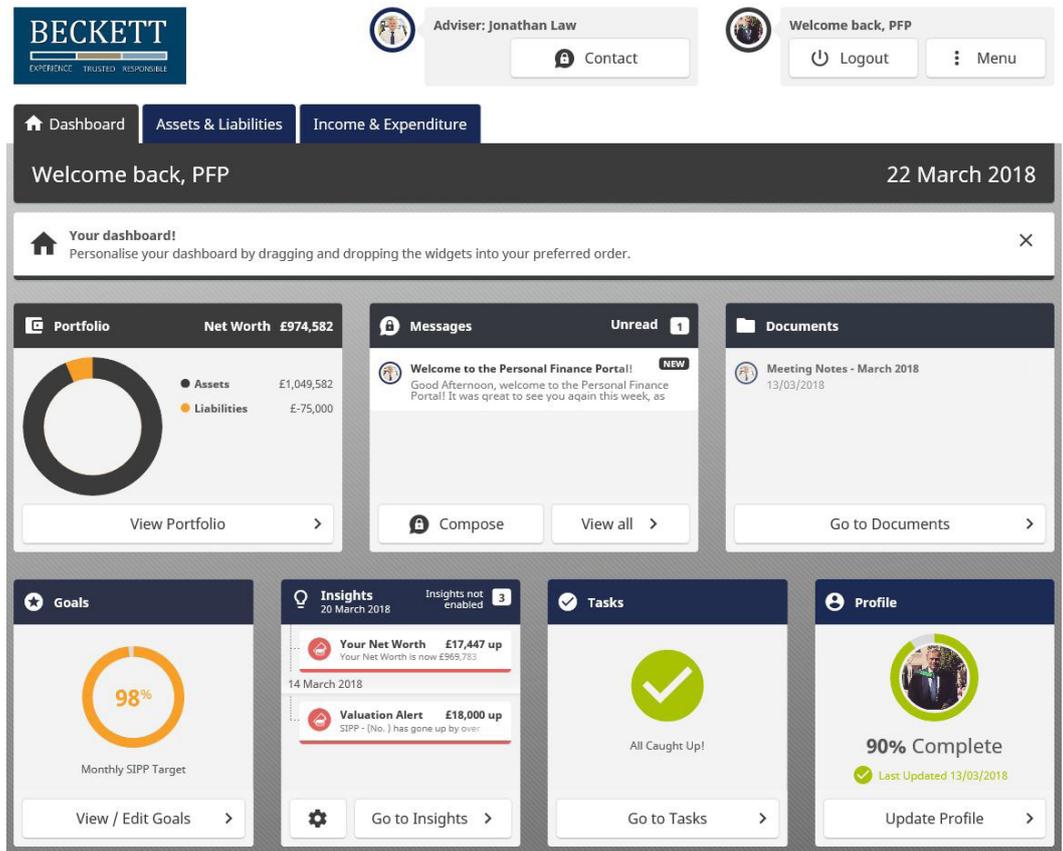
Becketts' commitment to provide the highest level of service for all clients means you can use the PFP for free, including the Premium features. PFP Premium allows you to combine short-term bank accounts and credit card data with longer term finances such as loans and mortgages. And you can make use of features such as Budgets, Goals so you can fully utilise PFP's capabilities and have a real handle on your finances.

## PROVEN TECHNOLOGY

Intelliflo works closely with a number of global partners who have outstanding reputations and expertise in security to ensure your data is safe. Becketts has a long and trusted relationship with Intelliflo and we are excited to be able to provide this service to you.

None of your online banking credentials (e.g. username and password) is stored by Intelliflo nor your Consultant; it is passed to Yodlee which is the world-leading specialist in financial data, processing 9 million UK account refreshes every month.

Yodlee will automatically pull your financial data from your bank accounts, credit cards, mortgages etc., on a daily basis and, with its connections to 184 UK account providers, your data on the portal will be correct and up to date. All Yodlee information is on a read-only basis.

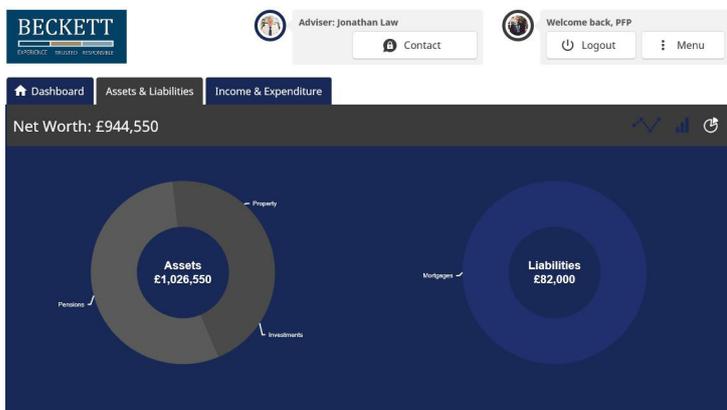


## A COMPREHENSIVE PICTURE OF YOUR FINANCES

PFP enables you to build a comprehensive picture of your entire financial position by aggregating your short, medium and long-term finances whilst, at the same time, enabling us to manage and service your financial needs more effectively.

## HOW TO ACCESS YOUR PFP

As a Becketts client you are entitled to use the Personal Finance Portal with our compliments. Talk to your Consultant about registering. Or email our dedicated Portal Manager [jonathan.law@beckettinvest.com](mailto:jonathan.law@beckettinvest.com).



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