PERSONAL FINANCE PORTAL

USER GUIDE

BECKETT
FINANCIAL SERVICES
EXPERIENCE TRUSTED RESPONSIBLE

Certified B Corporation

The personal finance portal (PFP) gives you access to view all your finances in one place 24/7 on any mobile or web device. PFP enables you to view your fund information and financial portfolio at the click of a button. So, whether you are looking for an up-to-date valuation of your portfolio, update us with any changes in your circumstances, upload and securely share documents, or simply wish to get in touch, PFP has it covered.

ACCOUNT/PROFILE SETUP

1. Visit https://beckettinvest.mypfp.co.uk/ on your mobile or computer device.
2. Click 'Register' if not already registered and follow the four steps to get set-up.

Step 1
Enter your email address that you have given to your adviser.

Step 2
Tap the "Start Registration" button and we'll send an activation link to your email address.

Step 3
Tap the link in the email and follow the on-screen instructions.

Step 4
Congratulations! You are ready to log in to your Personal Finance Portal.

3. Click 'Menu'.
4. Click 'Profile'.
5. You will now be in 'Your Profile' where you can enter details about 'You & Your Family', 'Home & Contact' & 'Your Finances'.
6. Click on one of the three areas which takes you into the subcategories, now start answering questions to complete your profile.
7. Once areas are complete, a green tick will show with the area being a tone of green.
8. Once all the areas are complete, Click 'Home' which takes you to the dashboard which 'Your Profile' will be completed.

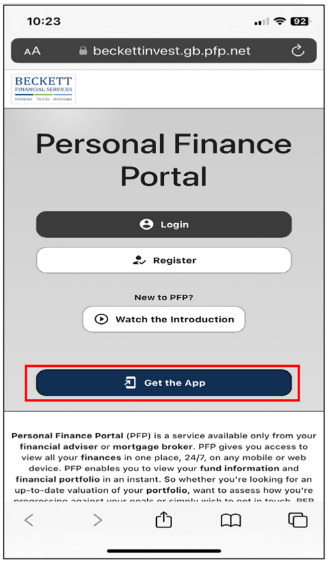
Note: You can leave any category/sub-category during the profile setup, and it will automatically save the details previously entered.

INSTALLING THE PERSONAL FINANCE PORTAL APP

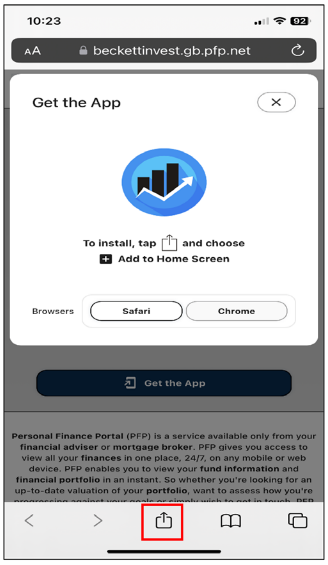
ON IOS – IPHONE/IPAD:

1. Visit https://beckettinvest.mypfp.co.uk/ on your mobile or tablet device.

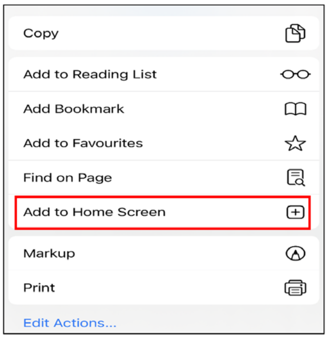
2. Tap on the 'Get the App' button.



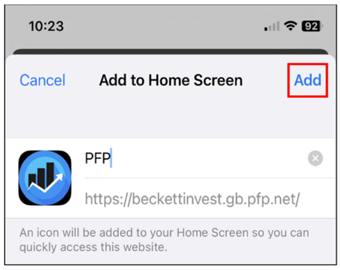
3. Tap on the button displayed in red.



4. Tap on the Add to Home Screen option



5. Tap 'Add'



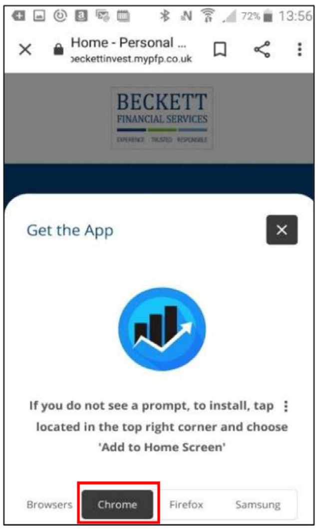
6. This icon will show on the home screen

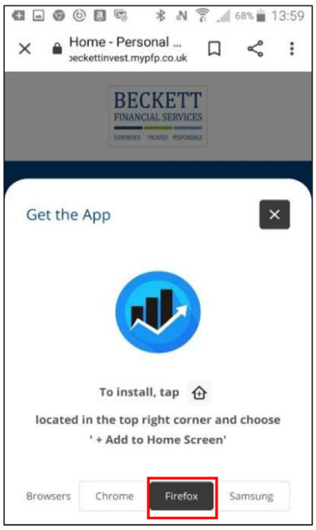
ANDROID – MOBILE/TABLET:

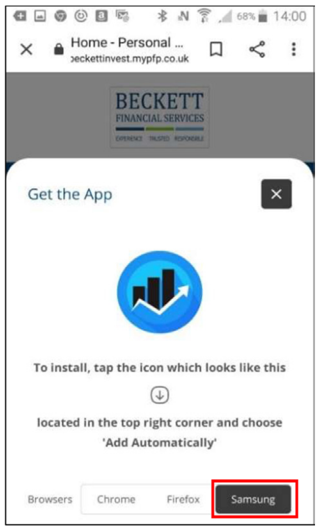
1. Visit https://beckettinvest.mypfp.co.uk/ on your mobile or tablet device.

2. Tap on the 'Get the App' button.

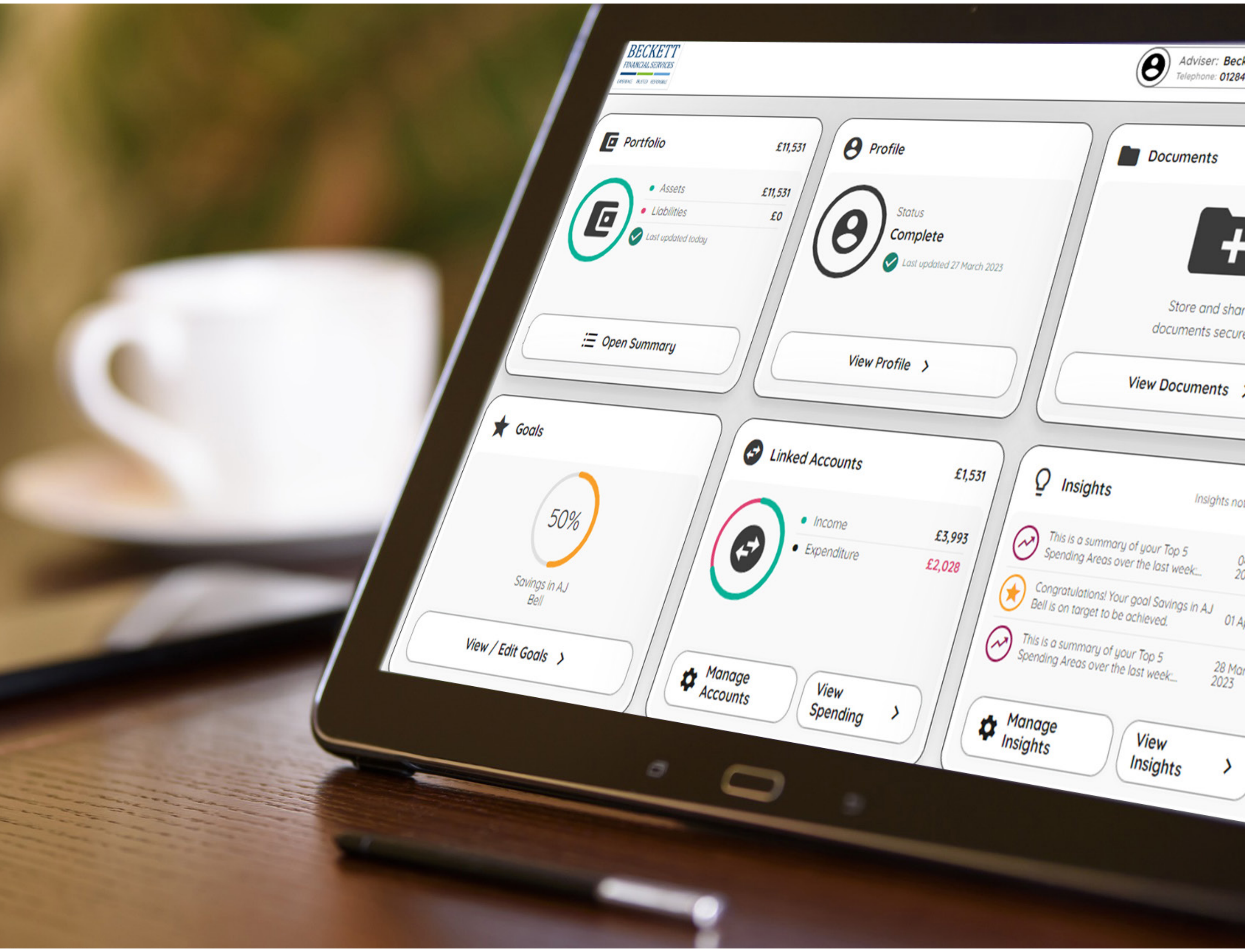
3. Tap on the icon displayed (this is usually located at the top of the browser) to add this to your home screen.







YOUR PFP DASHBOARD



Your adviser details are always at the top of the screen. You can tap their number to call them from a phone device or contact them via secure messaging by tapping 'Contact'. You can also log out or bring up the menu at any time using the buttons beside your own picture.

The dashboard widgets give you summaries on the following areas of PFP:

- **DOCUMENTS**

You can see and open any new documents that your adviser has shared with you, along with your other most recent documents. Documents which require your signature will have an appropriate label 'Requires Signature' next to them. You can also tap 'Go to documents' to view the full Documents page.

- **PROFILE**

This widget shows you how much of your profile information has been completed and how up-to-date the information is. You can tap to review and update the information. It's very important that your personal data is current and correct.

- **PORTFOLIO**

You can see an overview of your net worth which illustrates the size of your assets and liabilities. You can tap to view a full breakdown by category.

- **GOALS**

This widget shows your progress towards your savings goals. You can tap to view the full Goals page.

- **INSIGHTS**

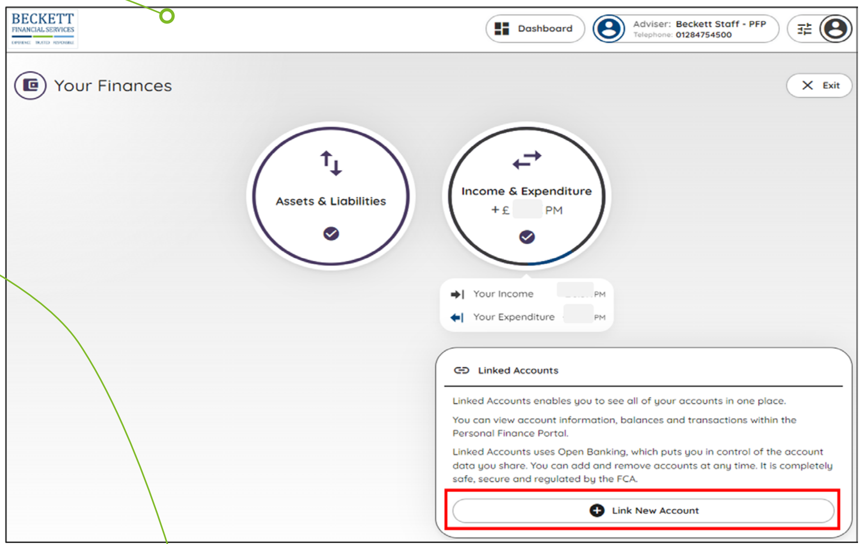
You can see the latest Insights relating to your finances. You can tap to view your Insights in full or to amend your Insights settings.

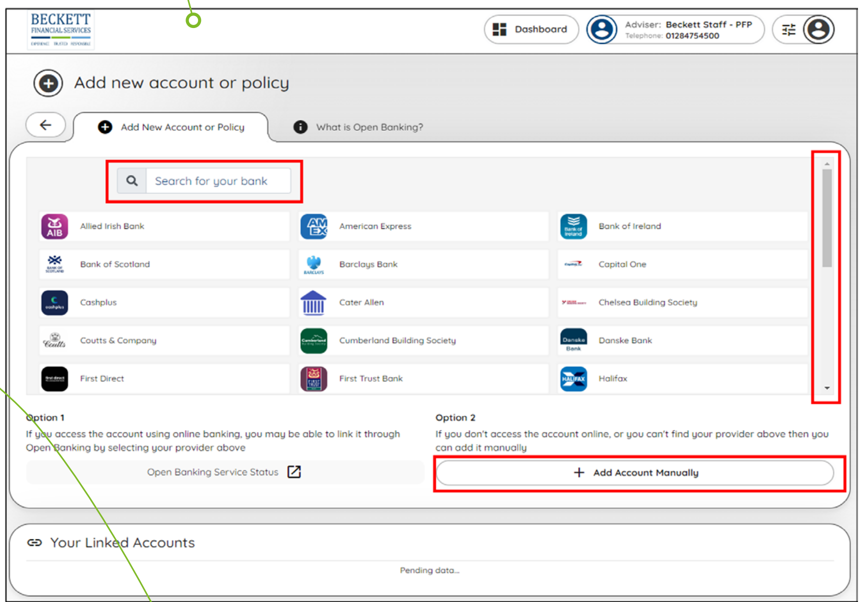
You can tap on the home icon in the header of any other page to get back to the dashboard home.

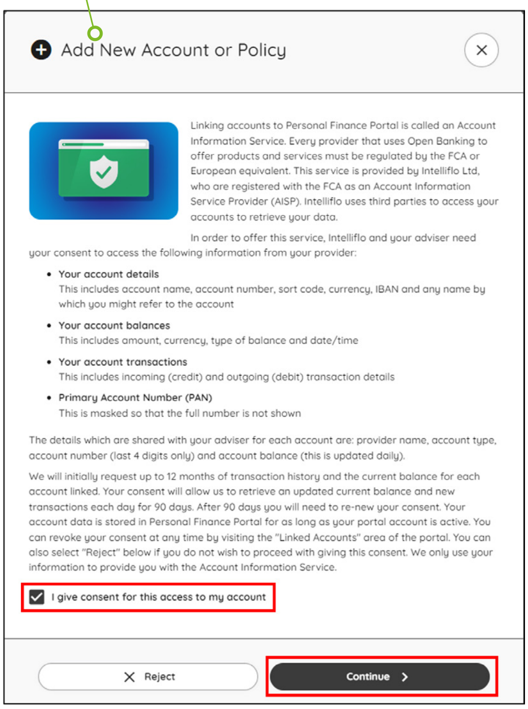
USING OPEN BANKING ON PERSONAL FINANCE PORTAL (PFP)

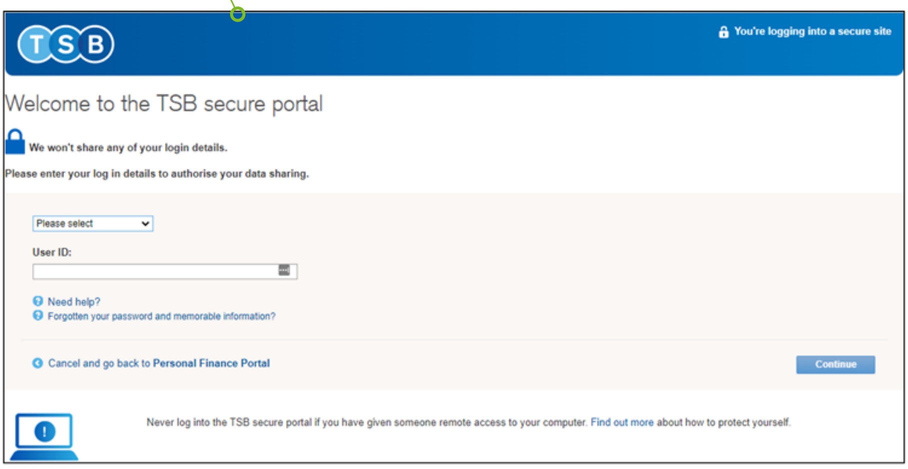
Open Banking is a service that allows you to make your online banking data available to applications you use, such as PFP. In PFP this service is called 'linked accounts.

1. Firstly, Log in to the Personal Finance Portal
2. Click 'View Profile'.
3. Click 'Your Finances'.
4. This section of the 'Your Finance's part of your profile will display the Linked Accounts/ Open Banking.
5. If you click on the 'Link New Account' it will show you a list of banks that are currently set up with PFP for Open Banking. You can search this list with the search bar or scroll up/down. However, if your provider is not listed, you can add your account manually.
6. When selecting the bank, you will need to give consent to Intelliflo to access your, details, transactions, and balances over the last 12 months, for a period of 90 days. After 90 days has passed since consent given, consent will need to be renewed.
7. When consent is given it will take you to the bank's access page to enter your details. They may vary between banks but this is an example for TSB Bank
8. Once set up the transactions and balance of the account will appear in the spending tab on PFP. You can link multiple accounts and PFP will categorise spending into categories for review.









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