



Personal Finance Portal

Giving you access to your finances 24/7



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finances 24/7



A convenient way to
view finances at the
click of a button



Always up-to-date*
and easy to use
*subject to availability from your
provider



Peace of mind
that it's completely secure



Accessible
document storage
wherever and
whenever you need
to access it



Gives you the
option to see all of
your advised and
non-advised
finances in one place



Opportunity to set up
alerts and insights
with **Personal
Finance Portal
Premium**



21st century services

We recognise that advances in technology mean our clients are increasingly choosing to interact with us across multiple channels; face to face, on the telephone and online. That's why we're introducing our new Personal Finance Portal, a revolutionary new app that enables you to see your complete financial picture in seconds at a time and place to suit you.



Peace of mind of bank-level security

What's more, everything is completely encrypted, meaning that you can communicate with us using the inbuilt messaging service safely and securely.



A convenient way to view finances at the click of a button

Accessible online 24/7 across desktops, laptops and mobile devices, Personal Finance Portal gives you access to your long-term savings and investment information in an easy to use, online format. And with the addition of Premium benefits, you can combine this with your short-term finances, such as bank accounts, credit cards, loans and mortgages, to see a complete picture of where you stand financially.



Accessible document storage that's second to none

Your Personal Finance Portal allows you to house all your documents, both financial and personal, in a single online document vault that's completely secure and fully backed up. It's far more secure than keeping paper copies in your filing cabinet or in a computer file which can be hacked.



Always up-to-date* and easy to use

Accounts, transactions and balances are refreshed every day so the information displayed in your Personal Finance Portal will always be up-to-date* and it's displayed in a visually engaging way that's really easy to understand. Because your Personal Finance Portal is cloud-based, getting up-to-date valuations becomes a breeze so you can always see how your investments are performing.



Personal Finance Portal Premium benefits

With that addition of Premium benefits, you'll be able to pre-set savings goals and set alerts to let you know whether you're on track or need to address a shortfall. Plus, you can categorise your spending and opt to receive useful insights into your spending habits so you can always be on top of where your money's going. And it's good to know that your bank account and credit card information is 'read only' so only you have access to your passwords.

Contact us

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