# Advisor Portal

## FAQ

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## How do I create an account?

Navigate to the online Advisor portal. There are 4 options:

1. **Existing user-sign in**

   If your account has been created in advance for you, you can simply log-in. You will have received an email informing you about account creation. On the portal, select Existing User.

2. **New user set up- existing advisor**

   If you are registered as an advisor, you can create an account to use the advisor portal. Select new portal user, select existing advisor and complete the account creation process. You will require your Aegon Advisor number and FCA reference number.

3. **New user set up- unregistered advisor**

   If you are not registered as an advisor with Aegon, you can create an account to use the portal and register as an advisor. Select new portal user and complete the account creation process.

4. **New user set up- temporary account**

   If you want to communicate with Citibank before you complete account creation and/or registration, you can create a temporary user account. The temporary account enables you to create a secure message. Select Contact us and complete the temporary account creation process.

## What is my user ID?

Your user ID is your email address.

## What are the password requirements?

You will need to create a password for your account. This password must meet the minimum requirements:

| Requirement type | Requirement |
|---|---|
| Length | 8-16 characters. |
| Character type | Alphanumeric- both letters and numbers. |
| Case | Lower and upper cases. |
| Uniqueness | Must not be the same as the previous 6. |
| Validity period | Must be changed every 90 days. |

Keep your password secret. You will be asked to change your password every 90 days. If the 90-day limit passes, you will be required to create a new password when you next login.

## Why do you need to verify my email address and mobile number?

Verification helps to keep your personal information safe, identify you, and to prevent fraud and other illegal activities.

# Logging in and password management

## How do I login?

Navigate to the Distributor portal login page. Select *Login now*.

You will be asked to enter the email address and password you setup when you registered. Carefully read the terms and conditions of use and select login. A code is sent to your mobile number. You will be prompted to enter the code. It is time-sensitive; you have 5 minutes to enter the code.

If login is successful, you will be taken to the dashboard.

If login is unsuccessful, an error message will be displayed advising you about what to do next.

## How do I log out of my online account?

You can log out of your account at any time. Select your profile and then select log out.

You should always log out when you have finished in the portal. It is important to maintain security.

Your session will automatically end after a period of inactivity.

## What happens when my session expires?

The portal is configured to automatically close after a period of inactivity (20 minutes). You will first be shown a warning message asking if you want to continue using the portal. If you do not respond within 20 minutes, the portal will close automatically and log you out.

## How do I reset my password?

You can reset your password at any time from within the portal. Select your profile icon and then select reset password.

A box will appear, and you will be guided through the reset password process. After you reset your password, you will be required to login using your new password.

## I forgot my password; how can I get a new one?

On the portal login page, select Forgot password. You will be asked to enter the email address used when you registered. An email will be sent to that email address.

Navigate to your email account and find the email. Select the reset password link in the email.

You will be asked to enter your new password and re-enter the same password. Once completed, select reset password. You will now be prompted to login using your email address and new password.

# Portal functionality

## What can I do once I have logged in to the portal?

On successful login, a registered user can see a dashboard. You can select:

- Client holdings.
- Secure messaging.
- Documents.
- Advisor details.
- Notifications.

Additionally, you can view more details on:

- Total value of holdings.
- Total number of clients.
- Outstanding KYC/AML clearances.

## How can I see my user type?

Your user type is displayed with your name as part of your user icon on the bottom left-hand side of the screen.

## Can I view detailed information about my clients' holdings?

The holdings screen provides detailed information about your client's holdings including client name, product type and total holdings. You can perform searches and download a report.

You can also see detailed information about a particular client or a particular account by selecting see client details or see account details. Additionally, you can download a contract note for a particular transaction.

## Can I view my secure messages?

The secure messages screen displays secure messages and details related to them. You can view a particular secure message and any comments and history that relate to that message. You can also reply to a secure message.

## Can I create a new secure message?

You can create a new secure message by selecting create new message from the messaging screen.

## Can I view documents?

The documents screen displays information about documents. You can view information about a document including document type, format and time of upload.

## Can I upload a new document?

You can upload a document by selecting upload document on the document screen. The document to be uploaded must be in JPEG, PDF or PNG format.

# Help

## How do I get help with using the online portal?

If you have and questions about using the online portal, you should first read the Questions and Answers. You should also read the help provided within the portal.

If you have registered for an online portal account and you are unable to access it, you can contact ZILO™ support for help:

Please phone: 020 4525 0196.

Technical support is available:

Monday to Friday 9am–5pm.