

Advisor Portal.

User Interface Guide

Version Ci UK 1.0.0

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Portal Login Screen.....	4
New User Registration.....	5
New User Registration-Registered Advisor	8
Existing Adviser Login	11
Dashboard Screen.....	13
Client Holdings.....	15
Secure Messages.....	19
Documents	21
Advisor Details.....	23
Inactivity Message.....	25
User icon	26
Document history	27

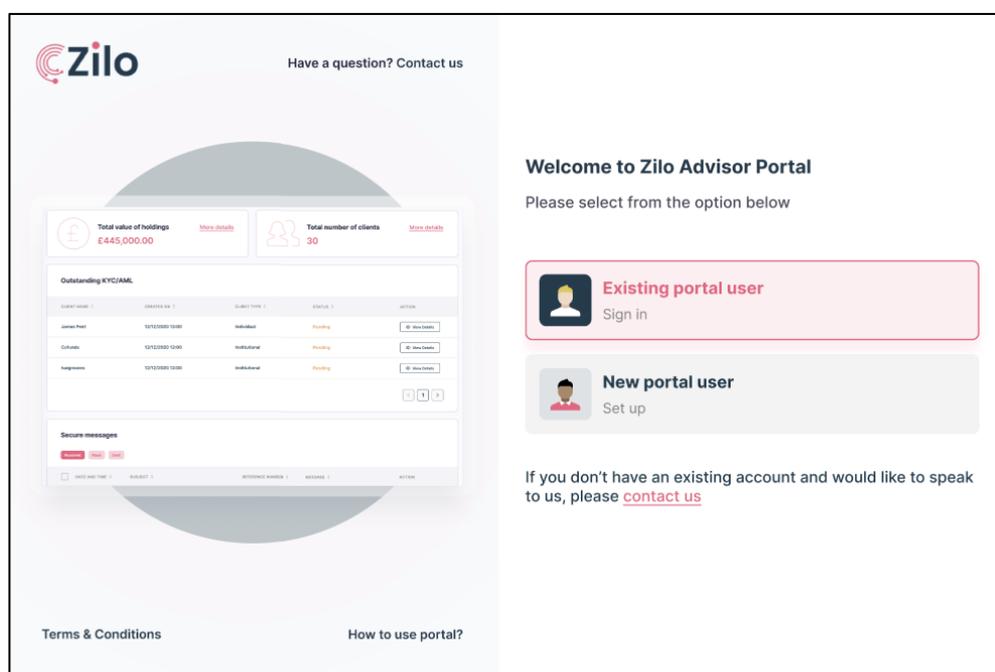
Portal Login Screen

The *Portal Login* screen enables you to:

- Login to an existing online account.
- Create a new online account - for an existing advisor already registered with Aegon.
- Register as an advisor with Aegon.

You can also:

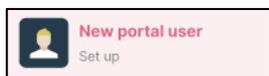
- View the terms and conditions of use.
- Access user support.
- View the Login Adviser Portal guide.
- Contact support staff.



Function	Purpose
User support	Selecting contact us will enable you to contact us.
User login	Select <i>Existing portal user</i> to login to your account.
New user account creation	Select <i>New portal user</i> to create an account.
Portal guide	Select <i>How to use portal</i> - to see guide.
Terms and Conditions of use	Select <i>Terms & Conditions</i> to see the terms and conditions of using the portal.

New User Registration

If you are a new user and are not currently registered as an advisor with Aegon, you can create a user account. Select the New portal user button.

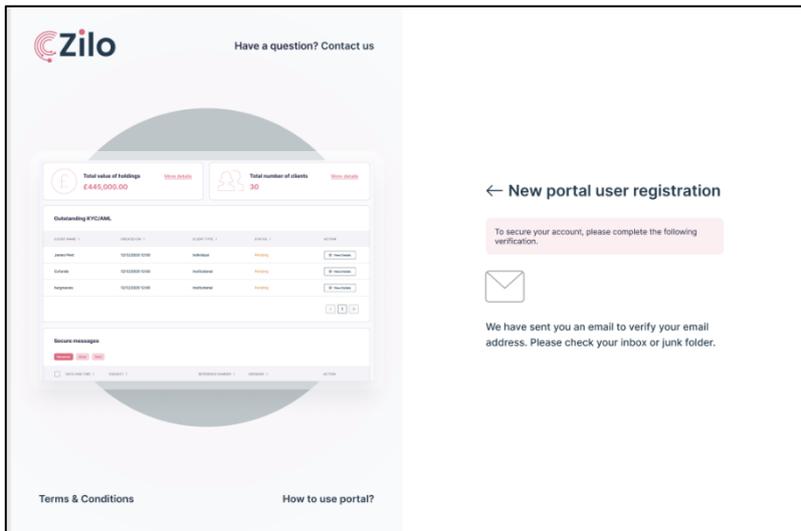


On selecting *New portal user*, you are taken to the *New portal user registration* screen.

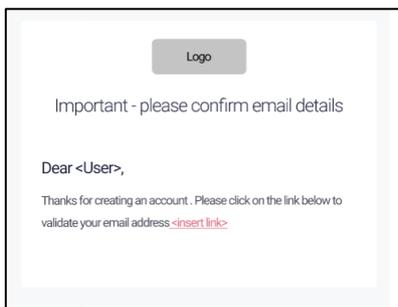
 A screenshot of the Zilo web application's registration page. The page is split into two main sections. The left section shows a dashboard preview with the Zilo logo, a "Have a question? Contact us" link, and several data cards: "Total value of holdings" (E445,000.00), "Total number of clients" (30), and a table of "Outstanding KYC/AML" records. The right section is titled "← New portal user registration" and contains a form with the following fields: a toggle switch for "Please select if you are an existing advisor and want to register for the Portal.", "Advisor company name" (with a placeholder "company name"), "First name" (with "Michael" entered), "Last name" (with "Scott" entered), "Email address (This will be your username)" (with "michael@gmail.com" entered), "Phone number" (with "+44 7988889871" entered), "Set password" and "Confirm password" (both with masked characters and eye icons), a checked checkbox for "By signing in you agree to the Terms and Conditions", and a red "Continue" button at the bottom.

Data request	Required data
Advisor Company Name	The name of your company.
First Name	Your first name.
Last Name	Your last name.
Email Address	Your email address.
Phone Number	Your mobile phone number in international format.
Set Password	A password.
Confirm Password	The same password.
Terms and Conditions	Agreement to the terms and conditions of using the portal.
Continue	Select to continue with your application.

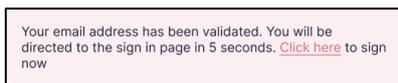
On selecting *Continue*, you are asked to verify your email address.



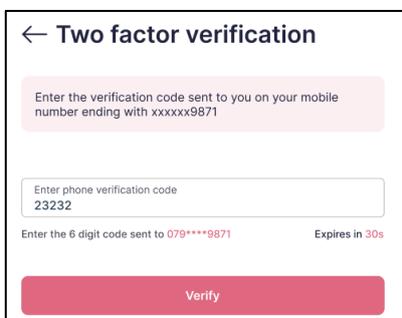
An email is sent to the email address that you specified when you registered for the account. The email will contain a link. Selecting the link verifies your email address.



After successful verification, a success message is displayed.

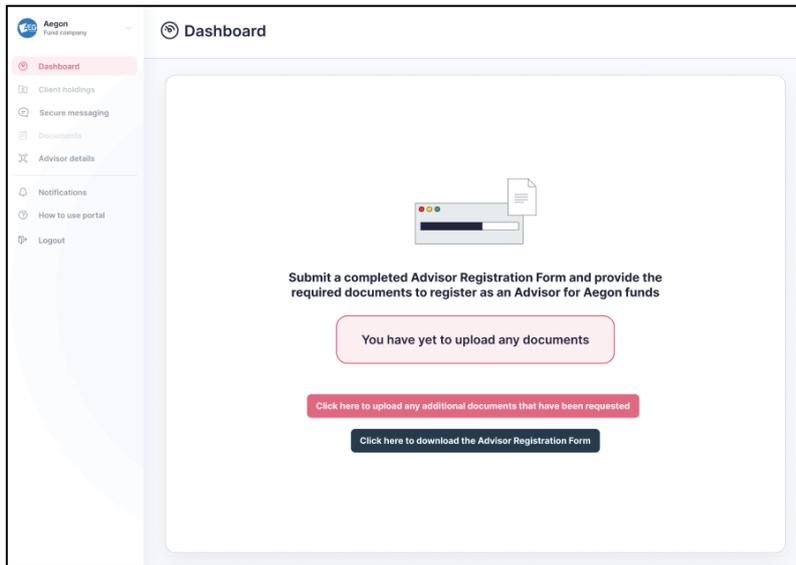


You are now asked to verify the mobile phone number that you specified during registration. A code is sent to the mobile phone number that you specified. You are then asked to enter the phone verification code.



After successful verification, you can login to your account. You will be taken to a temporary dashboard. Until you have completed the registration process, you will be unable to use portal functions.

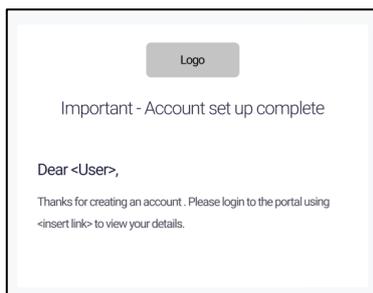
Here you can download an advisor registration form and once completed, upload it via the portal.



Select the upload documents button to upload the required documents.



Once your registration has been approved, you will receive an email advising you that your account setup has been completed.

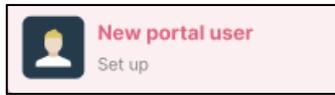


You can now enter your personal details by selecting *Advisor details*.



New User Registration-Registered Advisor

If you are a new user of the portal, but are currently registered as an advisor, you can create a user account. Select the *New portal user* button.



On selecting *New portal user*, you are taken to the *New portal user registration* screen.

A mobile app registration screen titled "New portal user registration" with a back arrow. It features a toggle switch that is currently turned off, with the text "Please select if you are an existing agent and want to register for the Portal." below it. There are three input fields: "Advisor company name", "First name", and "Last name", all of which are empty. Below the fields is a checked checkbox with the text "By signing in you agree to the [Terms and Conditions](#)". At the bottom is a pink "Continue" button.

Move the slider:

The same registration screen as above, but the toggle switch is now turned on (slid to the right). The checkbox for "By signing in you agree to the [Terms and Conditions](#)" is now unchecked.

Complete the required information.

The registration screen with the toggle on and the checkbox checked. The input fields are now filled with text: "Advisor company name" contains "ZILO", "First name" contains "Rob", and "Last name" contains "Gill". Each input field has a small 'x' icon on the right side. The "Continue" button remains at the bottom.

Email address
rgillespie@zilo.co.uk

Country code
+44 (United Kl...)

Phone number
7458196936

After selecting country code please add your mobile number removing the leading 0 - example 07984156*** should be entered as 7984156***

Create Password

Confirm password

Aegon agent number

FCA reference number

On selecting *Continue*, you are asked to verify your email address.

Zilo Have a question? Contact us

Total value of holdings: £445,000.00 [View details](#)

Total number of clients: 30 [View details](#)

Outstanding KYC/AML

CLIENT NAME	CLIENT TYPE	STATUS	ACTION
Johns Post	Individual	Pending	View Details
Gravels	Individual	Pending	View Details
Waggoner	Individual	Pending	View Details

Secure messages

← New portal user registration

To secure your account, please complete the following verification.

We have sent you an email to verify your email address. Please check your inbox or junk folder.

[Terms & Conditions](#) [How to use portal?](#)

An email is sent to the email address that you specified when you registered for the account. The email will contain a link. Selecting the link verifies your email address.

Logo

Important - please confirm email details

Dear <User>,

Thanks for creating an account. Please click on the link below to validate your email address: [insert link](#)

After successful verification, a success message is displayed.

Your email address has been validated. You will be directed to the sign in page in 5 seconds. [Click here](#) to sign now

You are now asked to verify the mobile phone number that you specified during registration. A code is sent to the mobile phone number that you specified. You are then asked to enter the phone verification code.

← Two factor verification

Enter the verification code sent to you on your mobile number ending with xxxxx9871

Enter phone verification code
23232

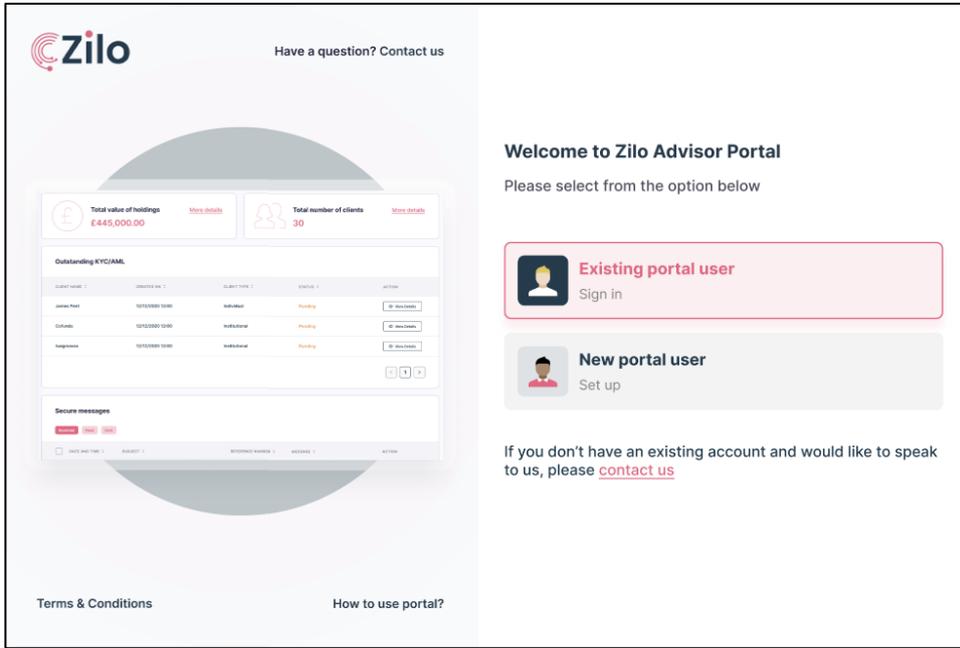
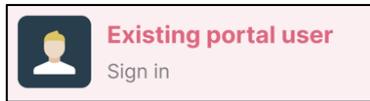
Enter the 6 digit code sent to 079****9871 Expires in 30s

Verify

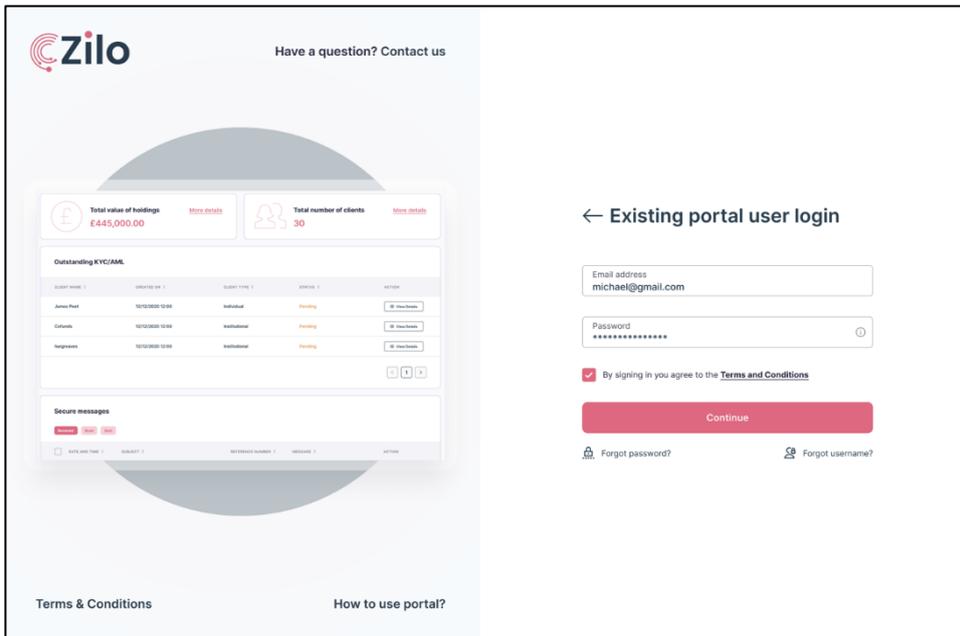
After successful verification, you can login to your account. You will be taken to a temporary dashboard. Until you have completed the registration process, you will be unable to use portal functions.

Existing Adviser Login

Once your account has been created, you can login by selecting *Existing portal user* on the login screen.



You will be taken to the *Existing portal user login* screen.

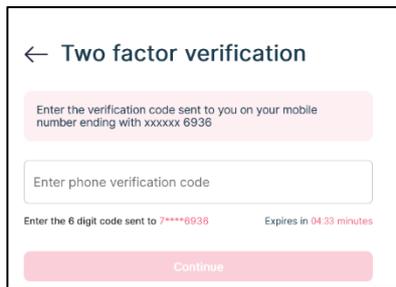


You are prompted to:

- Enter your username selected during registration (email address).
- Enter your password created during registration.

- Confirm you accept the terms and conditions of (portal) use.

You are asked to verify your login.



← Two factor verification

Enter the verification code sent to you on your mobile number ending with xxxxxx 6936

Enter phone verification code

Enter the 6 digit code sent to 7****6936 Expires in 04:33 minutes

Continue

A code is sent to the mobile phone number that you specified during registration. Enter the code and select continue.

A code is sent to the mobile number they selected during registration. They are prompted to enter the verification code and to select verify.

On successful login, you are taken to the dashboard.

Dashboard Screen

On successful login, you are taken to the dashboard. You can use the left-hand side navigation panel to access:

- 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.

You can also:

- View the how to use the portal guide.
- View your profile.

The screenshot shows the Aegon Fund company dashboard. The top left corner displays the Aegon logo and 'Fund company'. The top right corner indicates 'Powered by Zilio'. The dashboard is divided into several sections:

- Dashboard** (selected in the left navigation panel)
- Client holdings**
- Secure messaging**
- Documents**
- Advisor details**
- Notifications**
- How to use portal**
- Logout**

Key metrics displayed:

- Total value of holdings:** £445,000.00 (with a 'More details' link)
- Total number of clients:** 30 (with a 'More details' link)

Outstanding KYC/AML

CLIENT NAME	CREATED ON	CLIENT TYPE	STATUS	ACTION
James Peet	12/12/2020 12:00	Individual	Pending	View Details
Cofunds	12/12/2020 12:00	Institutional	Pending	View Details
hargreaves	12/12/2020 12:00	Institutional	Pending	View Details

Secure messages

DATE AND TIME	SUBJECT	REFERENCE NUMBER	MESSAGE	ACTION
25/01/2021 12:00	Important - Details about your account set up	534534543	Dear <Users name>, <insert clien...	View Details
25/01/2021 12:00	Important - Details about your account set up	534534543	Dear <Users name>, <insert clien...	View Details

User profile: **KG Kate Gabb**, Adviser

Function	Purpose
Client Holdings	Select to view information on your client's holdings.
Secure messaging	Select to view your secure messages and send new ones.
Documents	Select to view your document, upload new documents, and download them.
Adviser details	Select to view your advisor details.
Notification	Select to view and change notification settings.
How to use portal	Select to view guide on how to use the advisor portal.
Logout	Select to logout of your advisor portal.

Client Holdings

Selecting *Client Holdings* enables you to see detailed information about your client's holdings.

FUND COMPANY	ACCOUNT NUMBER	CLIENT NAME(S)	ACCOUNT TYPE	PRODUCT TYPE	TOTAL VALUE OF HOLDINGS	ACTION
Zilo Capital Unit Trust Managers Limited	900001930	Mary Fallon, Greg Fallon	Joint account	GIA	£105,157.07	Client Details Account Details
Zilo Capital Unit Trust Managers Limited	900001925	Gary Hart	Sole account	GIA	£9,874.33	Client Details Account Details
Zilo Capital Unit Trust Managers Limited	900001921	Greg Fallon	Sole account	GIA	£9,822.84	Client Details Account Details
Zilo Capital Unit Trust Managers Limited	900001903	Eaya Cooper	Sole account	ISA	£0.00	Client Details Account Details
Zilo Capital Unit Trust Managers Limited	900001864	Alicia Lotts	Sole account	GIA	£12,533.85	Client Details Account Details
Zilo Capital Unit Trust Managers Limited	900001289	Peter Burns	Sole account	ISA	£19,456.98	Client Details Account Details

Column	Purpose
FUND COMPANY	The name of the fund company.
ACCOUNT NUMBER	Your client`s account number.
CLIENT NAME (S)	Your client`s name.
ACCOUNT TYPE	The account type: sole/joint.
PRODUCT TYPE	The product: ISA/GIA.
TOTAL VALUE OF HOLDING	The total value of holdings held by your client.
ACTION	Select to see client details or account details.

You can search for a particular client using the search function:

- Client name.
- Account number.
- Product type.

Selecting *Client Details* in the *Action* column allows you to see detailed information about the client.

Client details	
Luke Harper	
Date of birth:	08/11/2000
Address:	12 Imperial House, 12-14 Exchange Street, Aberdeen, United Kingdom, AB11 6PH

Selecting *Account Details* in the *Action* column allows you to see detailed information about your client's holdings.

FUND COMPANY	ACCOUNT NUMBER	CLIENT NAME(S)	SHARE CLASS NAME	UNITS	PRICE DATE	PRICE	VALUE	ACTION
Zilo Capital Unit Trust Managers Limited	900001930	Mary Fallon, Greg Fallon	Zilo Capital China Fund Class R Inc	22,818.27	21/04/2023	£0.86	£19,627.21	View Transactions
Zilo Capital Unit Trust Managers Limited	900001930	Mary Fallon, Greg Fallon	Zilo Capital China Fund Class R Acc	92,957.14	21/04/2023	£0.92	£85,529.86	View Transactions

Column	Purpose
FUND COMPANY	The name of the fund company in which the investment is made.
ACCOUNT NUMBER	Your client `s account number.
CLIENT NAME (S)	Your client `s name.
SHARE CLASS NAME	The name of the share class invested in.
UNITS	The number of units.
PRICE DATE	The date on which the transaction was priced.
PRICE	Price for each unit.
VALUE	The value of the transaction.
ACTION	Select to view transactions.

Selecting create report allows you to download a report about your client holdings.



FUND COM	ACCOUNT	CLIENT NA	ACCOUNT	PRODUCT	TOTAL VALUE OF HOLDINGS
Zilo Capita	9E+09	Mary Fallo	Joint acco	GIA	105157.1
Zilo Capita	9E+09	Gary Hart	Sole acco	GIA	9874.33
Zilo Capita	9E+09	Greg Fallo	Sole acco	GIA	9822.94
Zilo Capita	9E+09	Enya Coop	Sole acco	ISA	0
Zilo Capita	9E+09	Alicia Lott	Sole acco	GIA	12533.65
Zilo Capita	9E+09	Peter Duni	Sole acco	ISA	53406.36
Zilo Capita	9E+09	Rupert Gil	Sole acco	GIA	59798.64
Zilo Capita	9E+09	Ray Stantz	Sole acco	GIA	41693.64

Column	Purpose
FUND COMPANY	The name of the fund company in which the investment is made.
ACCOUNT NUMBER	Your client `s account number.
CLIENT NAME(S)	Your client `s name.
ACCOUNT TYPE	The type of account.
PRODUCT	The product type: ISA/GIA.
TOTAL VALUE	The total value of the holdings.

Selecting *View Transactions* in the *Action* column allows you to see detailed information about transactions.

REAL DATE	SETTLEMENT DATE	ORDER REFERENCE NUMBER	ACCOUNT NUMBER	SHARE CLASS NAME	ISIN	DEAL TYPE	DEAL AMOUNT	PRICE	UNITS	SETTLEMENT AMOUNT	STATUS	ACTION
16/05/2023	22/05/2023	0000014300	9000001930	Zilo Capital China Fund Class R Inc	GB00B0123754	BUY	£10,000.00	£5.88	11,389.23	£10,000.00	Settled	Download Contract Notes
13/05/2023	16/05/2023	0000013950	9000001930	Zilo Capital China Fund Class R Inc	GB00B0123753	BUY	£10,000.00	£5.87	11,330.84	£10,000.00	Settled	Download Contract Notes

Column	Purpose
DEAL DATE	The date on which the deal was done.
SETTLEMENT DATE	The date on which settlement is due.
ORDER REFERENCE NUMBER	The allocated order reference number.
ACCOUNT NUMBER	Your clients account number.
SHARE CLASS NAME	The name of the share class.
ISIN	International Securities Identification Number.
DEAL TYPE	The deal type.
DEAL AMOUNT	The value of the deal.
PRICE	The unit price.
UNITS	The number of units.
SETTLEMENT AMOUNT	The amount settled.
STATUS	The status of the transaction.
ACTION	Select to download a contract note.

You can use the search function to find a particular transaction:

- Date.
- Transaction type.

Selecting Download Contract Notes in the Action column allows you to download a contract note for a particular transaction.



sumathi kalyan
22 Gordon House
Gordon Close
St Albans, Hertfordshire
AL1 5RQ

Account Number: 900001287
Deal ID: 000000004
Order Date and Time: 11/11/2022 10:43:47
Deal Date and Time: 11/11/2022 10:43:48
External Deal Reference:
Settlement Date: 12/11/2022
Adviser Name: Rob Gillespie
Order Channel: Retail

Client Name: sumathi kalyan
Product Name: GA
Fund Company: Aegon UK
Account Designation: test

You have bought the following shares from us:
Fund Name: VGN tech IBM | ISIN number: GB00BYVVLH23

Pricing Basis	Valuation Point	Price Type	No. of Shares	Price (pence)	Dilution Levy %*	Consideration
Forward	11/11/2022 11:00:00	SinglePrice	10,000.0	100.0	0.00%	£10,000.00

Settlement	Total Consideration :	£10,000.00
Information	Amount Settled:	£0.00
	Dilution Levy:	£0.00
	Balance Due:	£10,000.00
	Payment Reference:	AEGQXC88

IMPORTANT INFORMATION

No certificates will be issued to investors, therefore, please retain this contract note as a record of your investment.
We reserve the right to sell, on your behalf, the balance of your holding, should the sale result in the balance falling below the minimum holding allowed.

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Selecting create report allows you to download a report about the transactions.

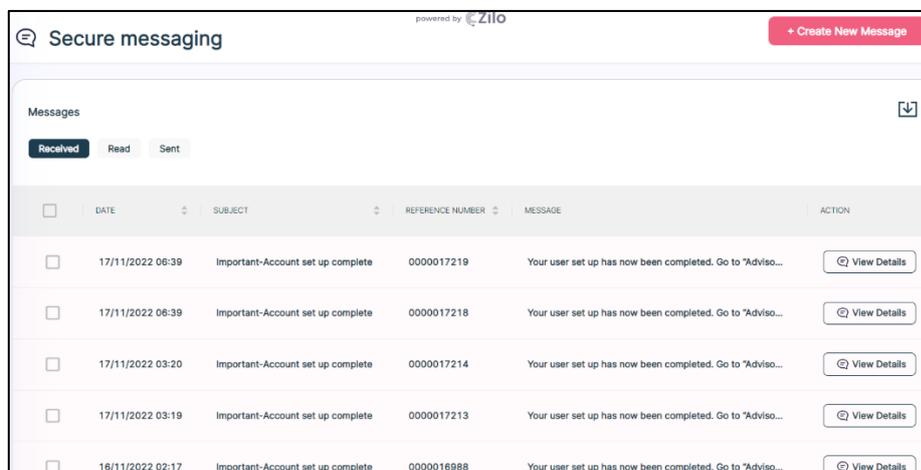


DEAL DATE	SETTLEMENT DATE	ORDER REFERENCE NUMBER	ACCOUNT NUMBER	SHARE CLASS NAME	ISIN	DEAL TYPE	DEAL AMOUNT	PRICE	UNITS	SETTLEMENT STATUS
#####	#####	14309	9E+09	Zilo Capita	GB00B1DT	BUY	10000	0.8781	11388.23	10000 Settled
#####	#####	13956	9E+09	Zilo Capita	GB00B1DT	BUY	10000	0.8673	11530.04	10000 Settled

Column	Purpose
DEAL DATE	The date on which the deal was done.
SETTLEMENT DATE	The date on which settlement is due.
ORDER REFERENCE NUMBER	The allocated order reference number.
ACCOUNT NUMBER	The clients account number.
SHARE CLASS NAME	The name of the share class.
ISIN	International Securities Identification Number.
DEAL TYPE	The deal type.
DEAL AMOUNT	The value of the deal.
PRICE	The unit price.
UNITS	The number of units.
SETTLEMENT AMOUNT	The amount settled.
STATUS	The status of the transaction.

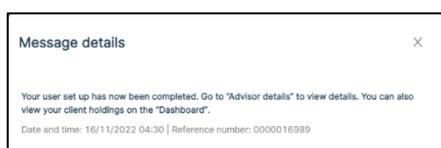
Secure Messages

Selecting *Secure messaging* on the left-hand navigation panel allows you to see your secure messages.

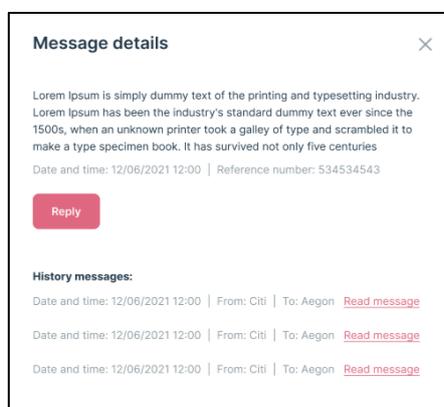


Column	Purpose
DATE	The date on which the message was received.
SUBJECT	The subject line of the message.
REFERENCE NUMBER	The message reference number.
MESSAGE	The message body.
ACTION	Select to view details.

Selecting *View Details* in the *Action* column enables you to see detailed information about the message.



You can view the message history. Selecting *Read Message* displays the message.



Selecting the *Reply* button allows you to reply to a message.

← Reply ×

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries

Date and time: 12/06/2021 12:00 | Reference number: 534534543

Please enter the details below

Selecting *Create New Message* to create a new secure message.

+ Create New Message

New message ×

Please enter the details below

Selecting create report allows you to download a report detailing your secure messages.

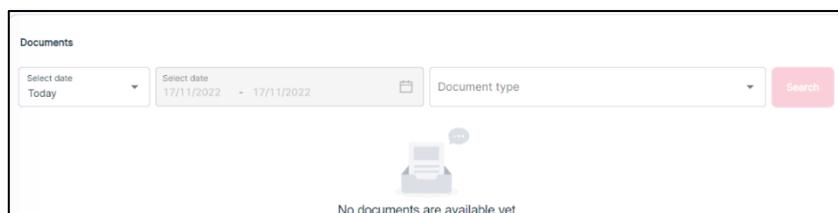


Date and time	Subject	Reference	Message
#####	Important: 00000172:		Your user set up has now been completed. Go to Advisor details to view details. You can also view your client holdings on the Dashboard .
#####	Important: 00000169:		Your user set up has now been completed. Go to Advisor details to view details. You can also view your client holdings on the Dashboard .
#####	Important: 00000169:		Your user set up has now been completed. Go to Advisor details to view details. You can also view your client holdings on the Dashboard .
#####	Important: 00000169:		Your user set up has now been completed. Go to Advisor details to view details. You can also view your client holdings on the Dashboard .
#####	Important: 00000167:		Your user set up has now been completed. Go to Advisor details to view details. You can also view your client holdings on the Dashboard .
#####	Important: 00000167:		Your user set up has now been completed. Go to Advisor details to view details. You can also view your client holdings on the Dashboard .
#####	Important: 00000165:		Your account has been successfully created and you are free to place an investment. Your details are: agent name- Rob Gillespie; agent number-4402-00000165.

Column	Purpose
DATE	The date on which the message was received.
SUBJECT	The subject line of the message.
REFERENCE NUMBER	The message reference number.
MESSAGE	The message body.

Documents

Selecting Documents on the left-hand side navigation panel takes you to the documents screen.



Column	Purpose
DOCUMENT DESCRIPTION	The description of the document.
DOCUMENT TYPE	The selected document type.
UPLOAD FORMAT	The format of the file uploaded.
FILE NAME	The name of the file.
UPLOADED ON	The date of upload.

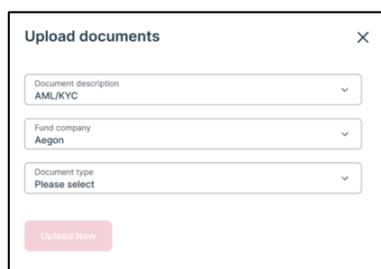
You can search for a specific document by:

- Period.
- Date.
- Type.

Selecting Upload Document enables you to upload documents.

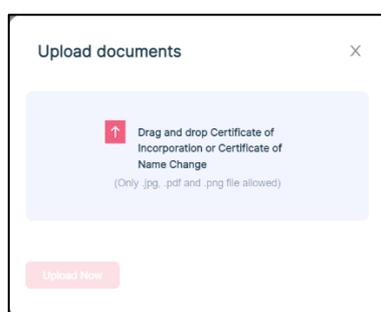


You must select a document description and document type.



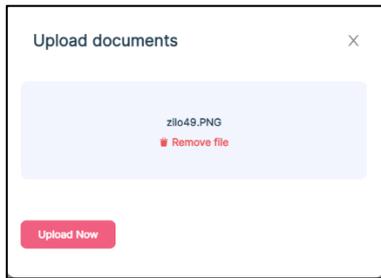
The screenshot shows the 'Upload documents' form. It has three dropdown menus: 'Document description' with 'AML/KYC' selected, 'Fund company' with 'Aegion' selected, and 'Document type' with 'Please select' selected. A pink 'Upload Now' button is at the bottom.

On selecting *Upload Now*, you can drag and drop the document.



The screenshot shows the 'Upload documents' form after clicking 'Upload Now'. It features a large light blue area with a red arrow icon and the text: 'Drag and drop Certificate of Incorporation or Certificate of Name Change (Only .jpg, .pdf and .png file allowed)'. A pink 'Upload Now' button is at the bottom.

You can remove the file by selecting Remove file or select *Upload Now* to upload the document.



Advisor Details

Selecting *Advisor Details* on the left-hand side navigation panel takes you to the advisor details screen.

Column	Purpose
ADVISOR NUMBER	Your advisor number.
ADVISOR NAME	Your advisor name.
ADVISOR TYPE	Advisor type.
ADVISOR SUB-TYPE	The advisor sub-type.
ACTION	Select to view details.

You can search by:

- Advisor name.
- Advisor number.

You can view detailed information about an advisor by selecting *View Details* in the *Action column*.

You can use the slider to see more information.

Bank details

Bank details (1/1) Show details

Owner: XXX

Account name: XXX

Account description: XXX

Bank or building society name: XXX

Account number: XXX

Currency: XXX

Sort code: XXX

IBAN number: XXX

SWIFT code/BIC: XXX

ABA number: XXX

Registered address: XXX

You can view bank details by selecting the toggle.

Bank details

Bank details (1/1) Hide details

Owner: Capital Idea IFA

Account name: OpenZen IFA Network

Account description: --

Bank or building society name: Barclays Bank plc

Account number: 20012002

Currency: GBP

Sort code: 20-20-20

IBAN number: --

SWIFT code/BIC: --

ABA number: --

Registered address: 7 Poultry, London, United Kingdom, E14 8QA

You can download a report about advisors by selecting download a report.

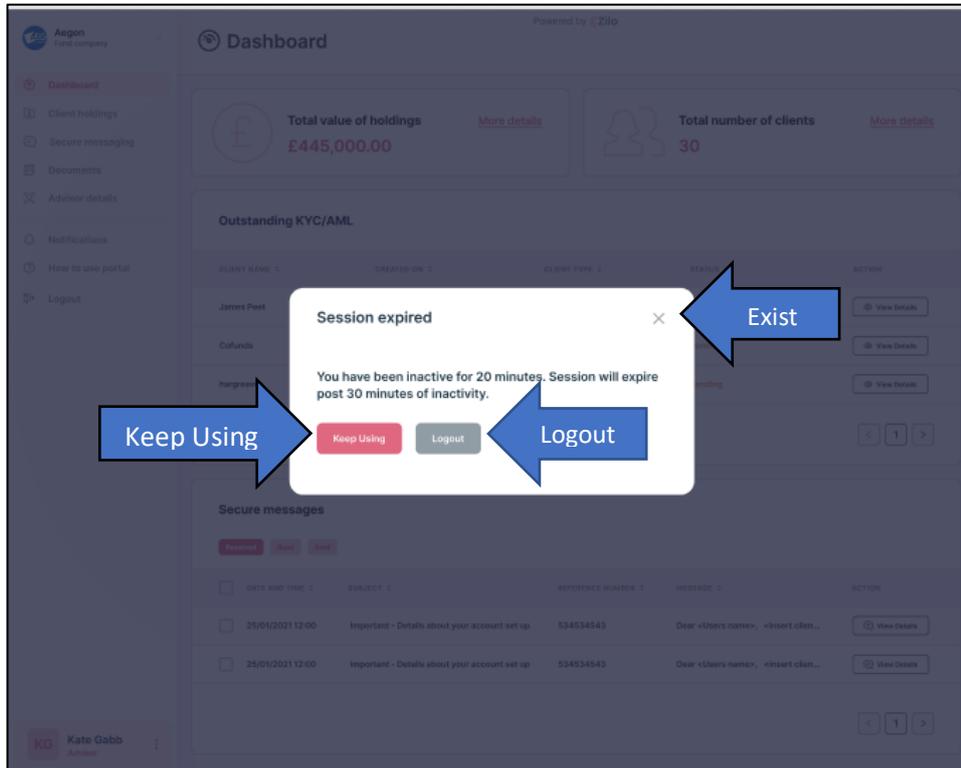


ADVISOR N	ADVISOR N	ADVISOR T	ADVISOR SUB-TYPE
4402-0000	Rob Gilles	Authorisec	Advised

Column	Purpose
ADVISOR NUMBER	Your advisor number.
ADVISOR NAME	Your advisor name.
ADVISOR TYPE	Advisor type.
ADVISOR SUB-TYPE	The advisor sub-type.
ACTION	Select to view details.

Inactivity Message

If you are logged into the portal but are inactive for 20 minutes, a session expiry message will be displayed.

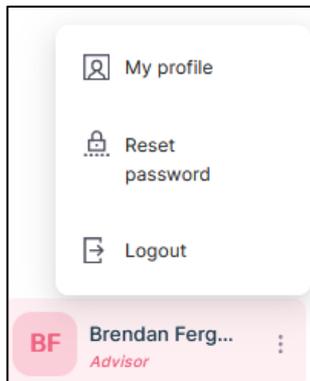


Function	Purpose
Keep Using	Select to stay logged in.
Logout	Select to logout of your advisor portal.

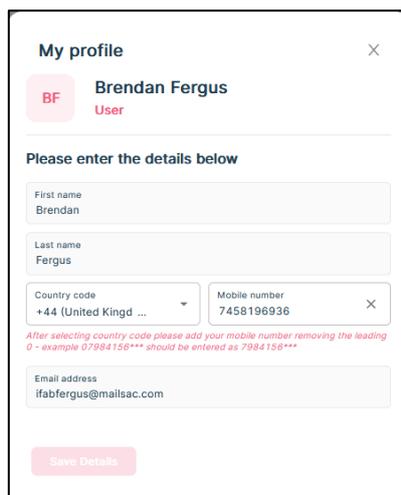
User icon

Selecting the user icon enables you to:

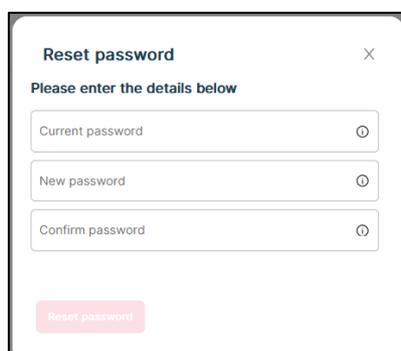
- View your profile.
- Logout.
- Reset your password.



Selecting my profile displays user profile information.

A screenshot of the 'My profile' form. The title is 'My profile' with a close button. Below the title is the user's profile information: a pink circle with 'BF', the name 'Brendan Fergus', and the role 'User'. A section titled 'Please enter the details below' contains several input fields: 'First name' (Brendan), 'Last name' (Fergus), 'Country code' (a dropdown menu showing '+44 (United Kingd ...)'), 'Mobile number' (7458196936), and 'Email address' (ifabfergus@mailsac.com). A 'Save Details' button is at the bottom. A small red note below the mobile number field reads: 'After selecting country code please add your mobile number removing the leading 0 - example 07984156*** should be entered as 7984156***'.

Selecting *Reset password* enables you to reset your password.

A screenshot of the 'Reset password' form. The title is 'Reset password' with a close button. Below the title is the instruction 'Please enter the details below'. There are three password input fields: 'Current password', 'New password', and 'Confirm password', each with a circular icon on the right. A 'Reset password' button is at the bottom.

Selecting logout will immediately log you out of the portal.

Document history

Document history is recorded in reverse chronological order.

Creator	Date	Approver	Date	Notes
RG	05/07/23			First version published