

PARTNERS WEALTH MANAGEMENT

Getting the most from your investments

A guide to the Partners Wealth Management
client portal



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Introduction

Over the last few years, it has become apparent that an ability to see your total asset allocation and performance instantly online is important to you and us so we can immediately view, control and if necessary, change the risk in your portfolio(s).

With clearer visibility, we are rapidly able to take action to reduce threat or seize opportunity as your approach to risk changes in accordance with the investment outlook and forecasts. The 7IM platform provides this functionality whilst many other investment platforms do not aggregate performance or asset allocation across your wrappers.

The 7IMagine for Partners Wealth Management app allows you to securely access your portfolio on any device of your choice at any time. It allows you to compare how investments are doing with a variety of market indices and other measures, it also lets you drill down into portfolios by geography, asset type and account. Furthermore, you can receive market and economic news and a wide choice of links to other news, opinion and lifestyle content.

If you have any questions or issues registering for the Online Portal and the app, please do not hesitate to contact your Partners Wealth Management adviser's team.

Chapter 1:

Accessing your online service

Navigating

1

You can find the Client Portal Login page via the Partners Wealth Management website, at the top right hand corner of the page.

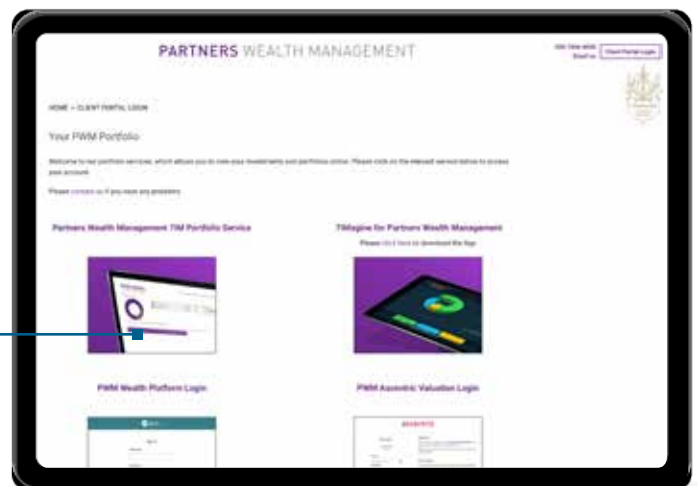
2

On this page, select the **Partners Wealth Management 7IM Portfolio Service** option.

HERE



PARTNERS WEALTH MANAGEMENT 7IM PORTFOLIO SERVICE



Registering – viewing your own investments

1

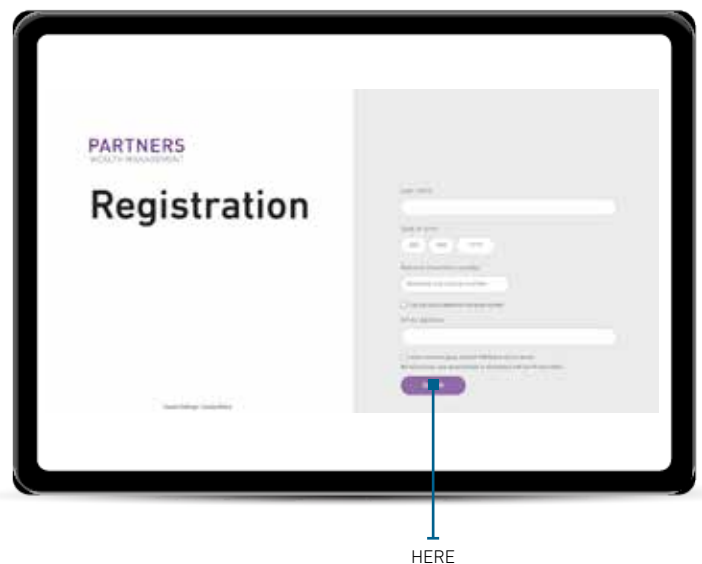
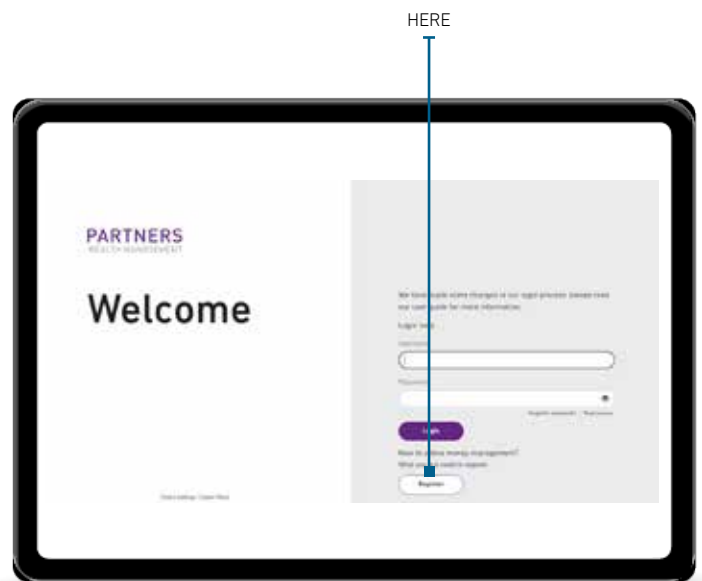
On the **'Welcome'** screen, please click **'Register,'** then select the option **'I would like to view my own investments.'**

2

At this point, you will need to input the following personal information:

- Last name
- Date of Birth
- National Insurance Number
- Email Address

Read and tick to confirm the **'7IM Online Service terms'**, then **'Submit'**.



Chapter 1: Accessing your online service

Continued

Registering – viewing investments on behalf of a Trustee or Power of Attorney

Before you can register for online access, please ensure you have the reference that was on your 'Welcome Letter' as you will need to enter that on screen. If you have not received this, please get in contact with your Partners Wealth Management Adviser.

1

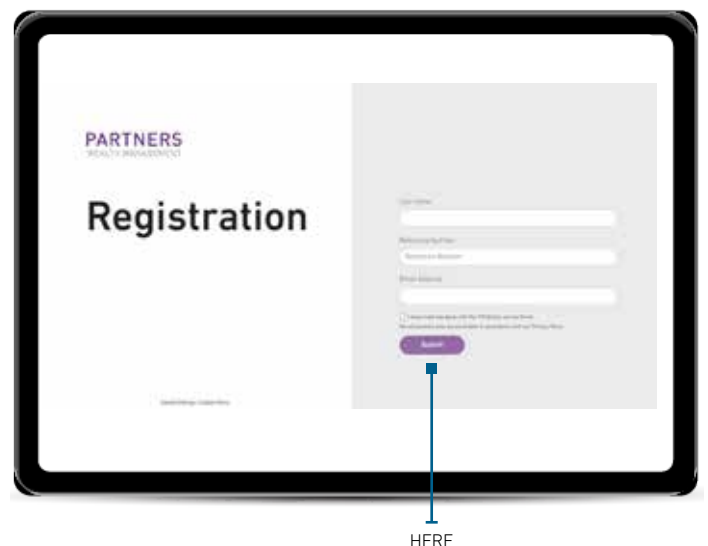
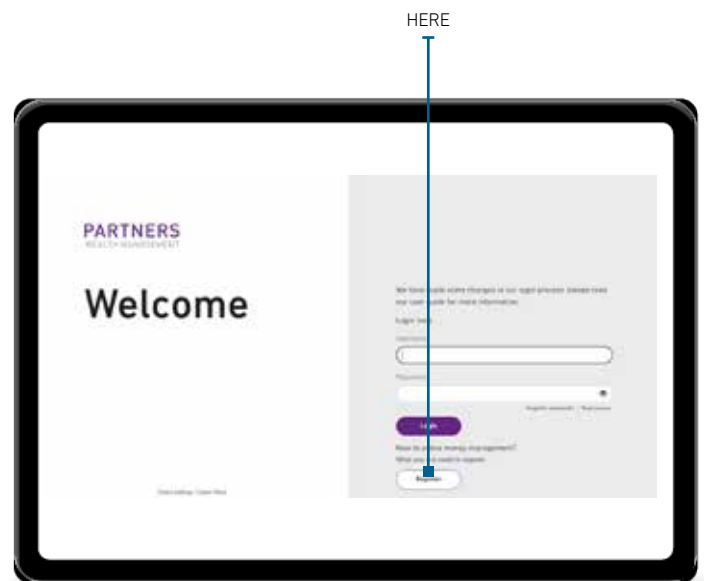
On the 'Welcome' screen, please click **'Register'**. Then, choose **'I would like to view the investments on behalf of a:**

- **Client (if you have Power of Attorney / Court of Protection)**
- **Corporate entity**
- **Charity**
- **Trust'**

2

- On the following screen, please enter the following personal information:
- Your last name
- Your reference
- Your email address

Read and tick to confirm the **'7IM Online Service terms'**, then **'Submit'**.



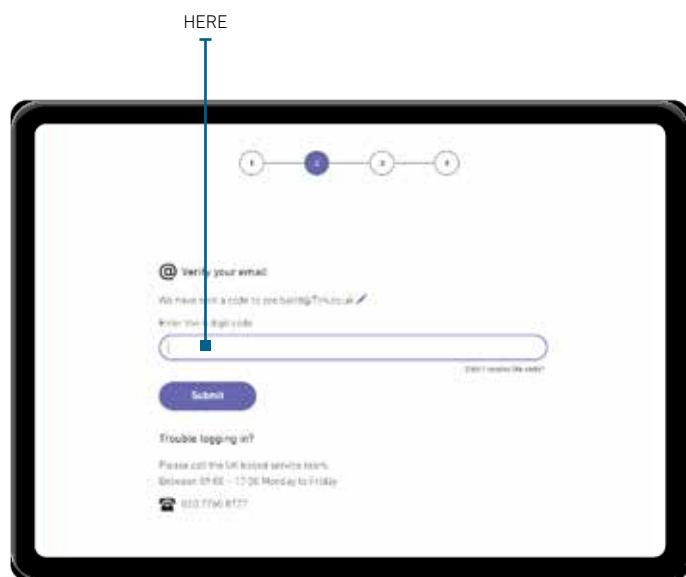
Chapter 2:

Two-factor authentication

These steps are to be followed if you are viewing your own investments, or on behalf of a trustee or power of attorney.

1

On the 'Email verification' screen, enter the verification code we have sent to your email address. If you do not receive a verification code within a couple of minutes you can request a new code by using the **'Didn't receive the code'** link and 7IM will send you a new code.



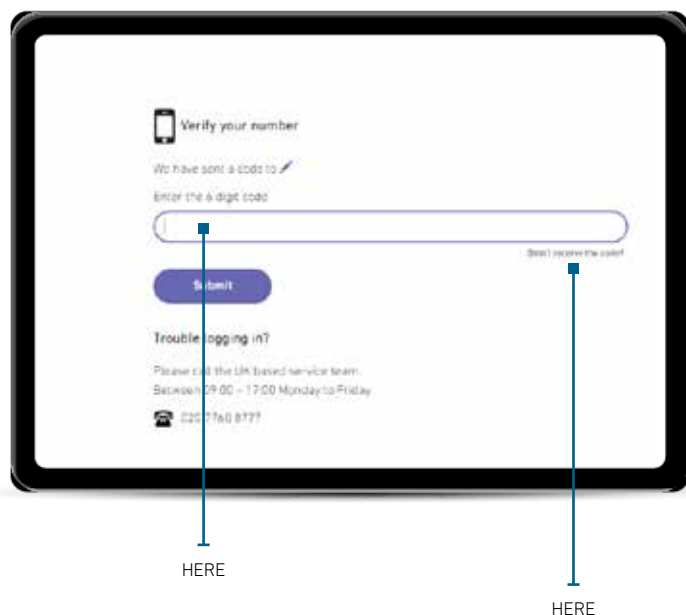
2

Enter your mobile number for verification.

Having two methods of communication verified is the most secure way to log in. However, if you do not wish to verify your mobile number, you may skip this step and move to step 4.

3

On the second verification screen, enter the verification code we have sent to your mobile phone. If you do not receive a verification code within a couple of minutes you can request a new code by using the **'Didn't receive the code'** link and 7IM will send you a new code.



Chapter 2: Two-factor authentication

Continued

4

On the security details screen you will need to create a password, a memorable word and hint. Your password must contain a minimum of 10 characters and at least 3 of the following:

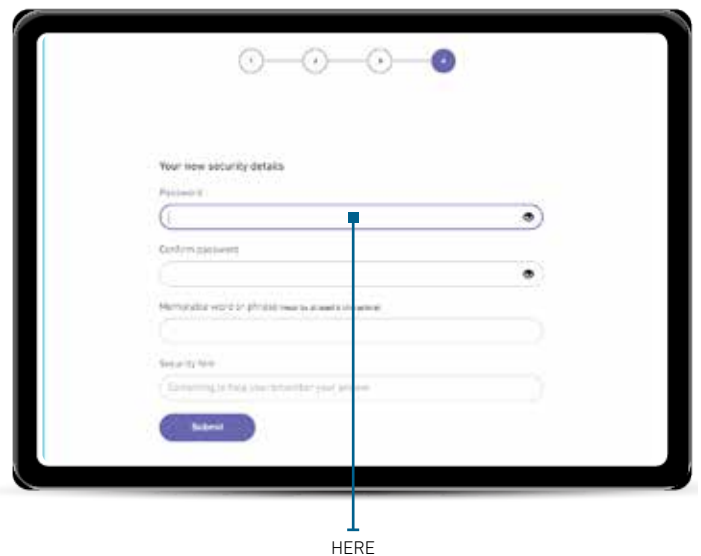
- a number
- a lowercase letter
- a uppercase letter
- a special character

You have now created your login details.

5

Next time you log in your login details will be:

- **Username:** this will be your email address.
- **Password:** this will now be the password you have created in step 4 that is a minimum of 10 characters. You will need to enter all of the characters when logging in.
- **Security code:** a security code will be sent directly to your email address or mobile phone.



Chapter 3:

Using your online service

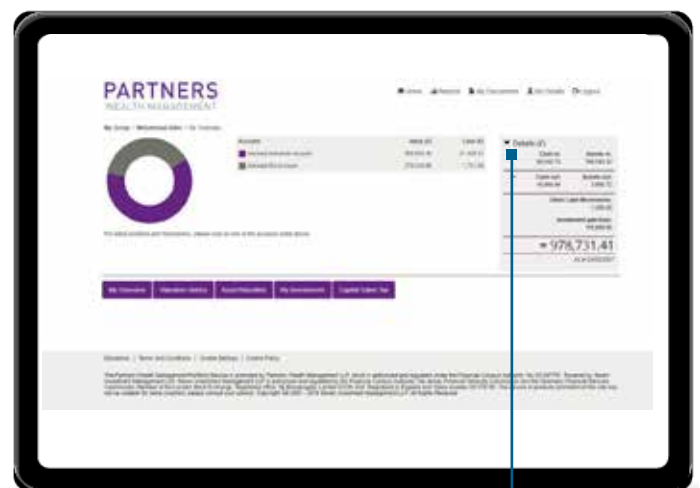
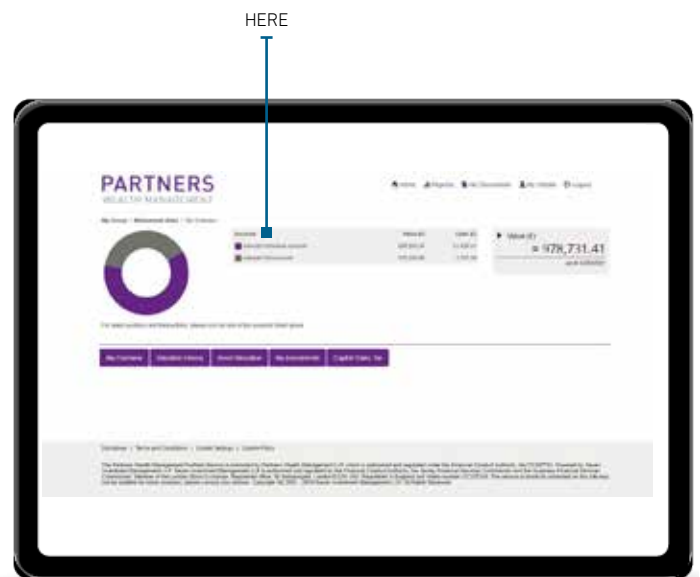
My Overview

My Overview shows you an at-a-glance view of all of your accounts. If you have cash available to invest in an account, you will see this displayed under the **'Cash'** column.

You can click on the name of your account in the summary table or select individual accounts using the drop down to view individual accounts in more detail.

If you have any accounts that are linked to others – family members, or perhaps other Trustees, you will also be able to see an overall picture of all of your accounts and then be able to drill down into each account to see more detail.

Expand the **'Value'** box to view a quick summary of your investments at a glance.



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Chapter 3: Using your online service

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Valuation History

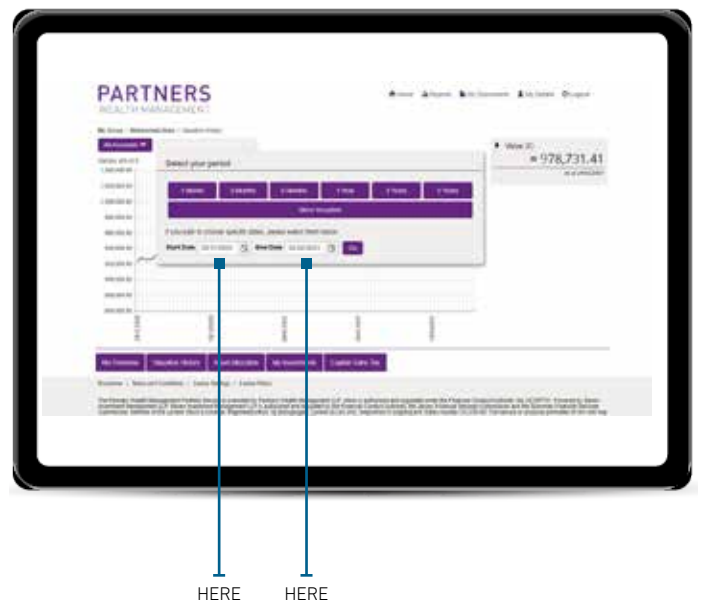
This tab provides an illustration of the value of your account(s) over time. The default setting display shows the value of all of your accounts over the previous three months.

You can use the filters in the top left of the screen to select individual accounts or change the time period.

Clicking on the date range opens a window pre-populated with a few default date ranges.

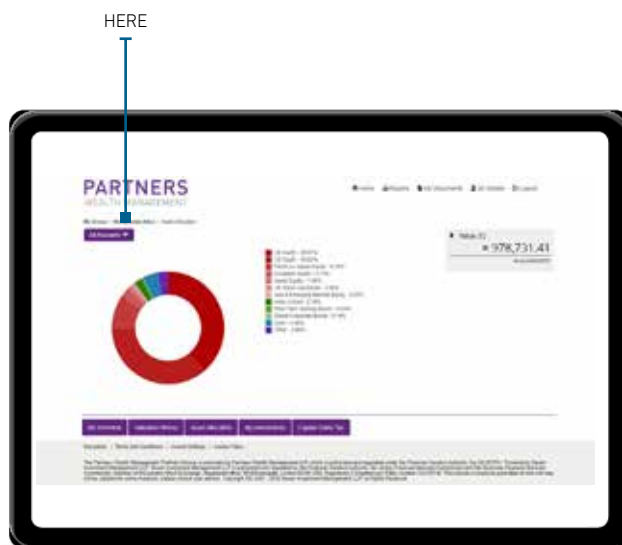
You can also enter specific dates of your choice.

The valuation summary box also appears on this screen.



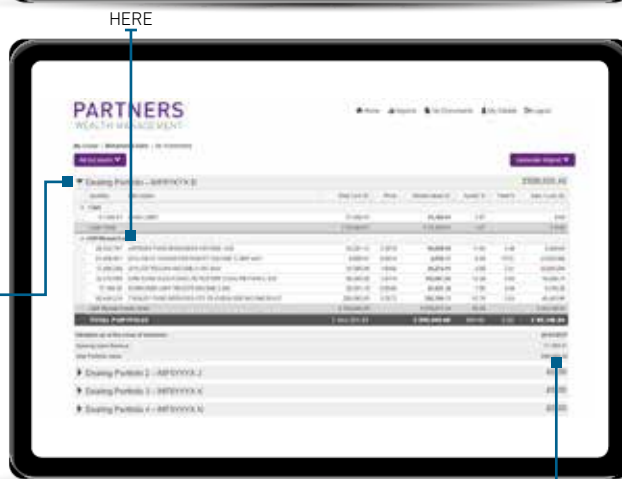
Asset Allocation

This tab will display the asset allocation of all of your accounts. Use the drop down menu to select individual accounts.



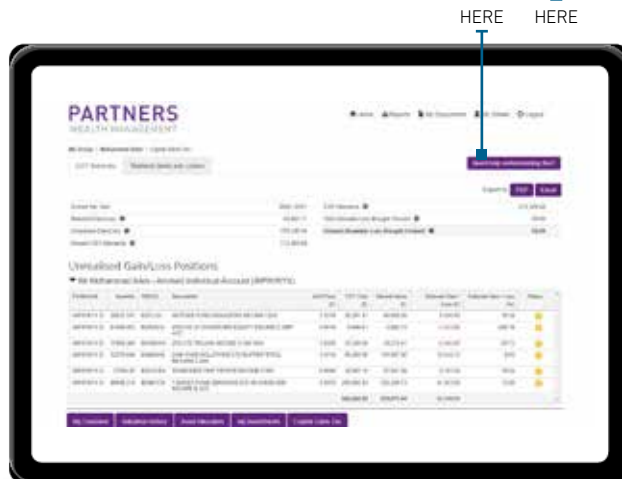
My Investments

View a detailed list of all of your investment holdings on this tab. Use the arrows to expand and collapse individual accounts. Selecting a 7IM Fund will take you to the latest detailed portfolio holding for that fund. The bottom of this page includes a table detailing the total value of your assets and available cash balance.



Capital Gains Tax (CGT)

Your Financial Adviser will take responsibility for managing your CGT position. The CGT summary displays your current CGT eligible holdings and unrealised gains and losses. Click on the **'Need help understanding this'** for a detailed guide to our CGT tool.



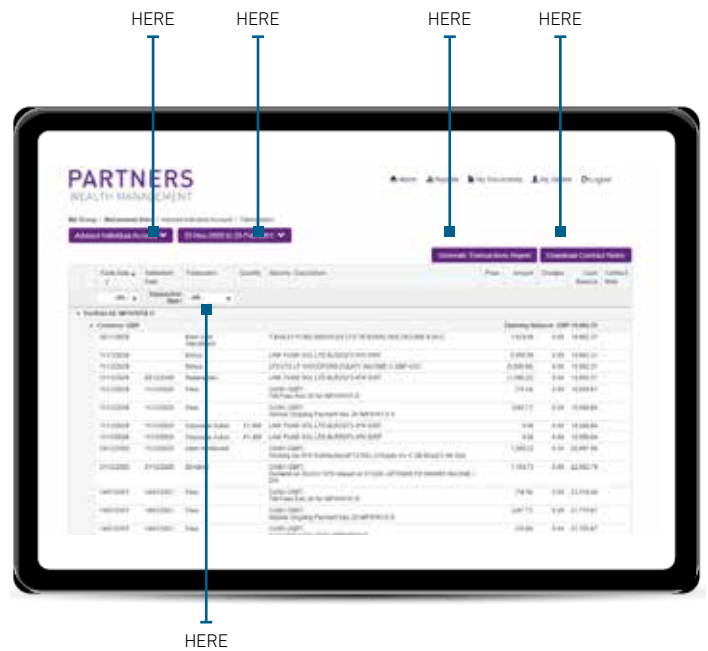
Continued

Transactions

Selecting an Individual account on any of the screens will display the **'Transactions'** tab.

You can use the filters at the top of the page to switch between accounts and time periods. The Transaction filter can be used to further search for specific types of transactions. Contract notes are displayed next to all purchase and sale transactions.

Use the **'Download Contract Notes'** button to generate a single .pdf file of all of your available contract notes which you can print or save locally. The **'Generate a Transactions Report'** button creates a .pdf version of all of your transactions displayed on screen. Again you can print or save these locally.

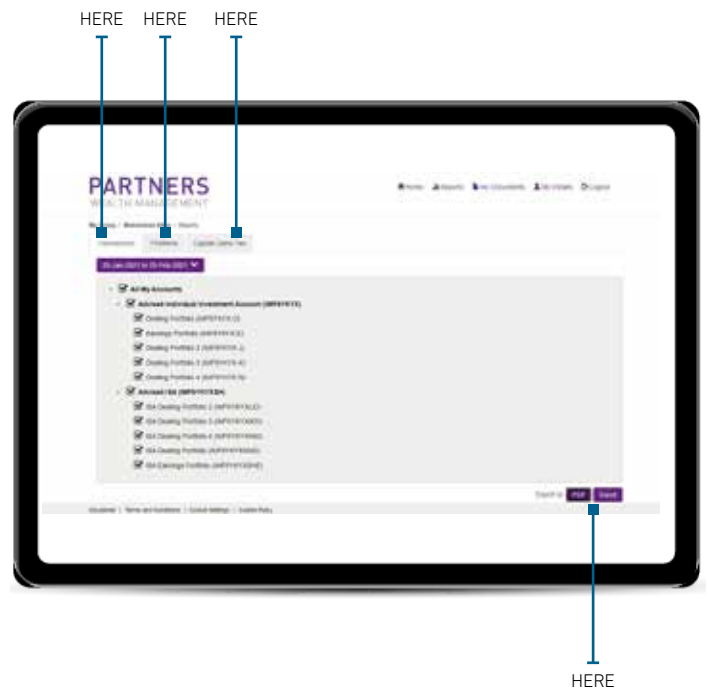


Reports

The **'Reports'** tab is a central place to generate each of the reports, available on the various screens. All reports can be generated in either Excel or .pdf format.

Select an account (or accounts) and a date range and then generate a list of all of the transactions for selected accounts using the **'Transactions'** tab.

'Positions' allows you to generate a list of holdings for your chosen accounts on a specific date. Use the **'Capital Gains Tax'** tab to generate a realised or unrealised CGT report for a chosen tax year.



My Documents

'My Documents' is where you will find current and historic Portfolio Valuation Reports. You can use the date filters to help you find the report you are looking for.

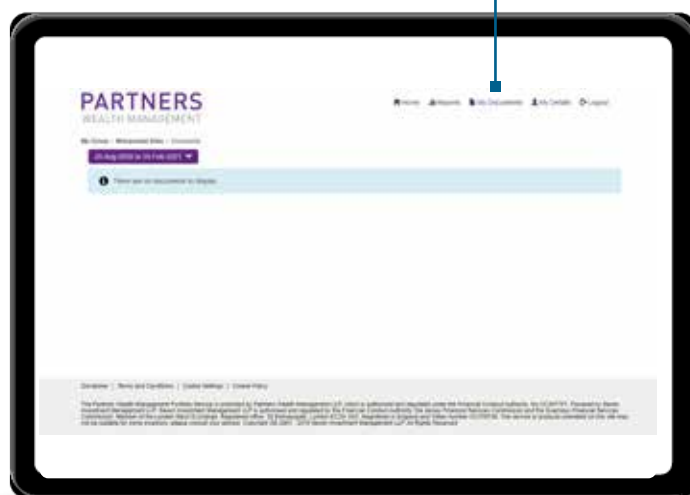
Other Tabs

'My Details' contains all of your client service information. The name, email and phone number of your Financial Adviser or Relationship Manager is displayed here.

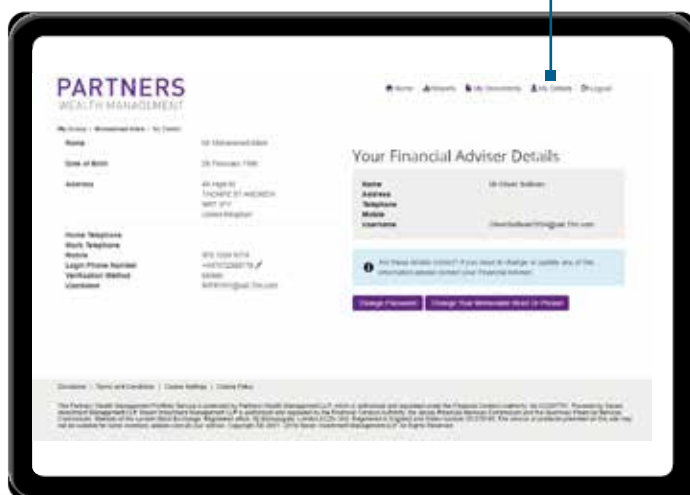
Where appropriate we also display your risk profile here. This page contains the contact information we have for you.

'Contact Us' takes you to an online form you can use to get in touch with us. Please note we are not be able to accept requests to reset your password using this form. Once you have finished your session, use the 'Logout' button to keep your account secure.

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Chapter 4:

Download the 7IMagine for Partners Wealth Management App

The 7IMagine App gives you total control and oversight of your finances in a fast, secure and intuitive way, wherever and whenever you desire.

You are able to see your portfolio activity, asset allocation, performance, relative risk and so much more.

Please visit our **website** for a further introduction to the 7IMagine app, as well as an insightful short video to talk you through the benefits.

Please use the same username and password as your online service to log in. Open your camera on your phone and hold in front of the QR code to download today.

If you have any questions or issues registering for the Online Portal and 7IMagine app, please do not hesitate to contact your Partners Wealth Management adviser's team.





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