

MY PERSONAL FINANCE PORTAL



GETTING STARTED



WELCOME TO THE TFA PERSONAL FINANCE PORTAL – GETTING STARTED

My Personal Finance Portal or PFP is an online portal where you can view your finances in one place, send and receive secure messages between you and your adviser and upload & store documents in a secure document vault among other features, 24/7 on any mobile or web device.

So, whether you're looking for an up-to-date valuation of your portfolio, want to assess how you're progressing against your goals or simply wish to get in touch, PFP has it covered.

What you see in PFP is a representation of data that your adviser has captured in their internal system, so any information you update in PFP will feed back to your adviser in real-time.

HOW TO REGISTER

1. On the TFA website www.tfagroup.co.uk please click the 'Secure Client Area' button located in the top right-hand corner of your screen.
2. On the PFP landing page click the 'Register' button.
3. You'll be prompted to enter your email address, that's the one that we hold on file, which in turn will trigger an email containing an activation link to be sent to your email account.
Note: The email you register with will become the email you log on with. If you have more than one email address and are unsure which we hold on file, please contact your adviser.
4. Upon receipt of the email, click on the activation link.
5. You'll now be directed to a page to verify your identity, define a password and view the Terms and Conditions. Once you have done this, click on the 'Register' button to complete the activation of your PFP account.
6. The activation process is now complete! You'll receive an on-screen confirmation message saying 'Activation process complete' and a link to login to your PFP account.

COMMUNICATING WITH YOUR ADVISER

Secure Messaging

You can see your new secure messages and your most recent read messages, and open them straight from the dashboard. You can also tap to compose a new message to your adviser, or to view the secure message page. Secure messages act as an audit trail for correspondence between you and your adviser and as such cannot be deleted.

Exchanging Documents

You can see and open any new documents that your adviser has shared with you, along with your other most recent documents. You can also tap 'Go to documents' to view the full Documents page.

Your Documents shows documents that you have uploaded.

Adviser Documents shows documents that your adviser and TFA have uploaded for you.

To send a secure message:

1. Press the **compose** button on the Dashboard Messages Widget or navigate to Messages in the side menu and press the Compose Message button
2. Enter a subject and your message content
3. The message is always sent to your servicing adviser. To add an attachment simply click "Add attachment from computer" button on the Compose message dialogue
4. Press **send**.

If your adviser has sent you a secure message with an attachment, you can upload this to 'Your Documents' by pressing the upload icon.

Uploading a document:

1. Navigate to **Documents**
2. Press the **upload** button
3. Browse to find file to select
4. Press **Upload**
5. Your document will now be visible under the **Your Documents** table.

To delete a document click **delete**

To download a document click **download**

**IF YOU HAVE ANY QUESTIONS PLEASE CONTACT
YOUR ADVISER DIRECTLY**



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