Access your finances the easy, secure way via our Wealth Platform

Your finances
at your fingertips

Green
FINANCIAL ADVICE LIMITED

The Green Financial Advice Wealth Platform brings you a range of unique online tools that will enable you to access your financial information easily and securely.

These tools give you the ability to view current valuations of your portfolio, review performance history, read important documents and communicate with Green Financial Advice.

This step-by-step guide introduces you to some of the tools you'll find at your fingertips with Green Financial Advice.

For most clients a small project will ensure that all personal and policy data is sufficiently detailed, accurate, up to date and correctly synchronised with provider price feeds and valuations. There may be a requirement to update the system with your personal views on financial objectives, timescales and other factors.

Depending on the level of interactivity and reporting you require, if you have old policies it may be worth reviewing them or modernising them to report in real time on the system. However, it won't always be possible and some old policies may have penalties that mean they can't be modernised. I can advise on this when you wish to start using the system and your policies are loaded on and reporting accurately. It may also require keying in of polices that I may not be aware of, so please be prepared for the possibility of a slight delay after first access whilst we attend to any additions or amends.

Select your access method.

You can view your details on a number of devices:

Web browser
Enter the following address in your web browser:
https://clientsite.tpinside.com

iPad
Download the free True Potential app from the App Store.

iPhone
Download the free True Potential app from the App Store.

Blackberry
Download the free True Potential app from the App World.

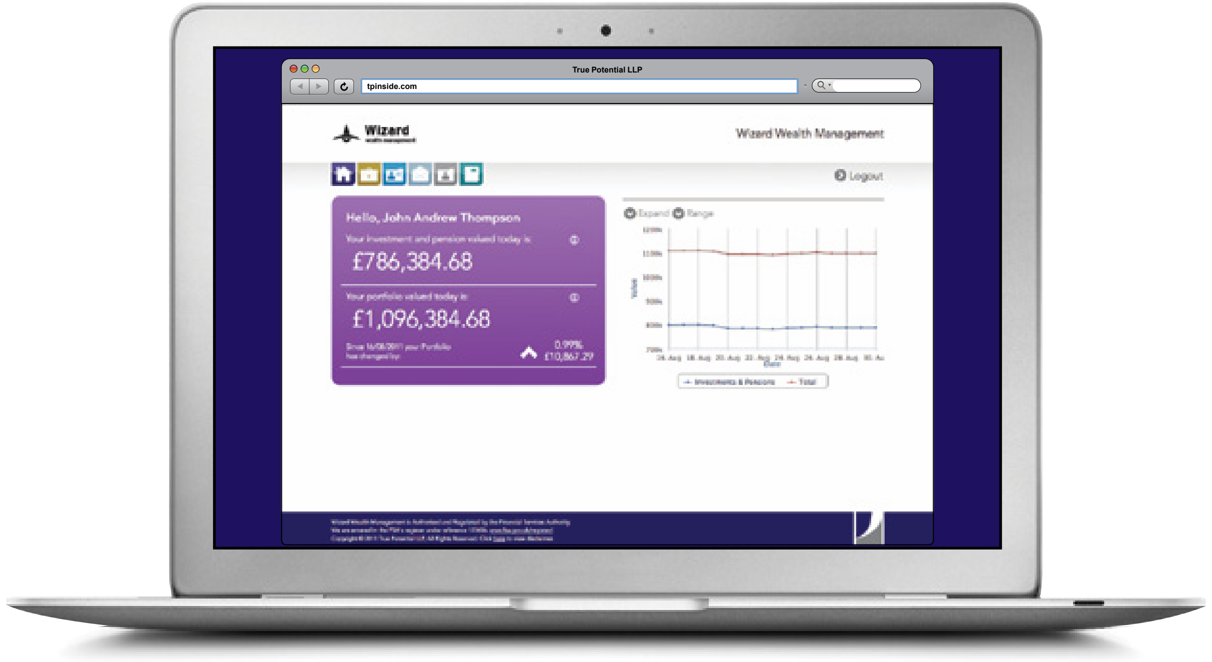
Google Android
Download the free True Potential app from the market.

1. Log into your site.

- Enter access details provided by your Financial Adviser.
- If it is your first login, leave the passphrase blank.

2. You are now logged in.

- If available, your browser will now automatically obtain a valuation for your assets.
- Changes to your portfolio value will be compared to any previous logins. If using a mobile device, refer to Step 5b. to obtain a current valuation.

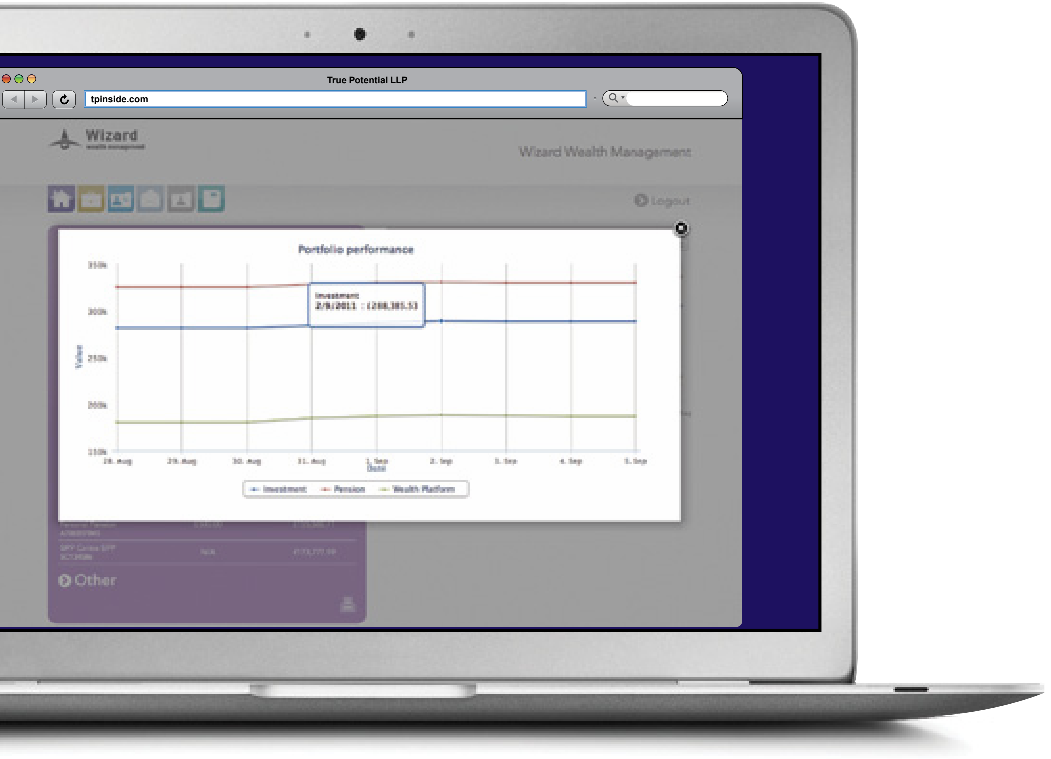


3. Common Functionality.

The following functionality will work throughout the portfolio pages of your site.

Expand	Click to view your chart in full screen format.
Range	Click to change the dates that your portfolio and charts will report.
Performance Chart	Click to change views between performance charts, asset allocation and portfolio splits.

4. How to use the charts.



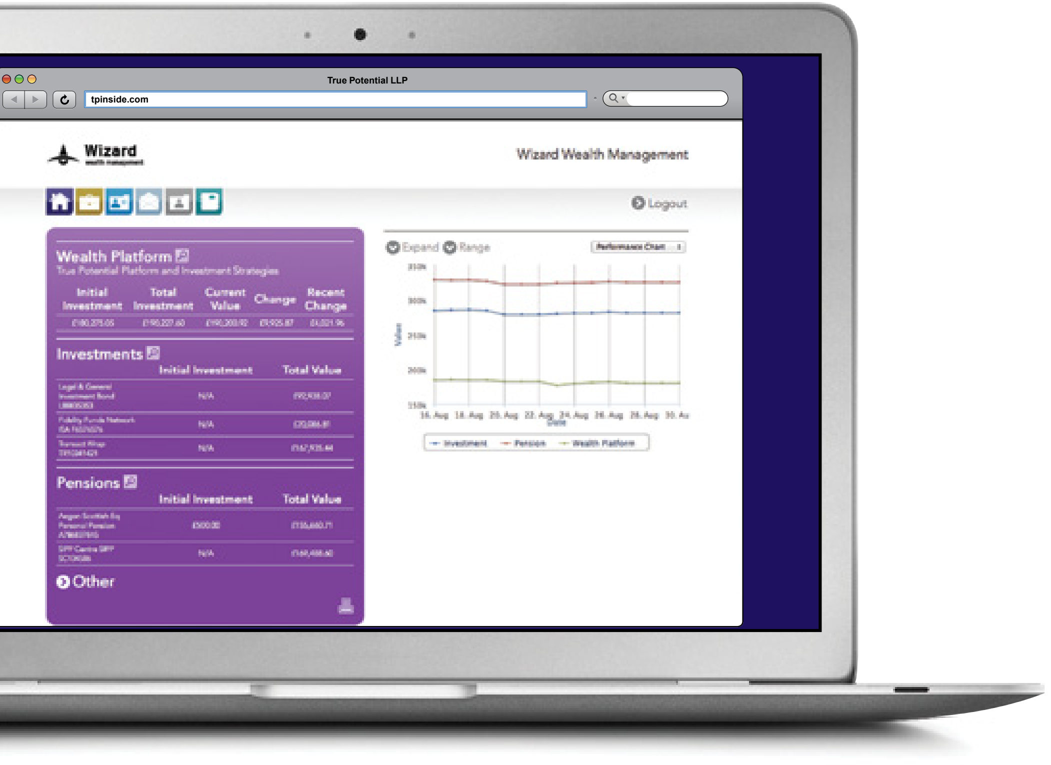
Performance Charts

- Hover your mouse over different data points to see a particular value.
- Click specific items on the key below the chart to hide/ display data.
- Click and drag your mouse over different data points to show only these dates.
- Click 'Reset zoom' to revert to default.

Pie Charts

- Hover your mouse over different segments to see a particular value.
- Click a segment to 'separate' it from the rest of the chart.

5a. Check your latest valuation via web browser.



Click the 'My Portfolio' button which is in the top left hand corner of your page.

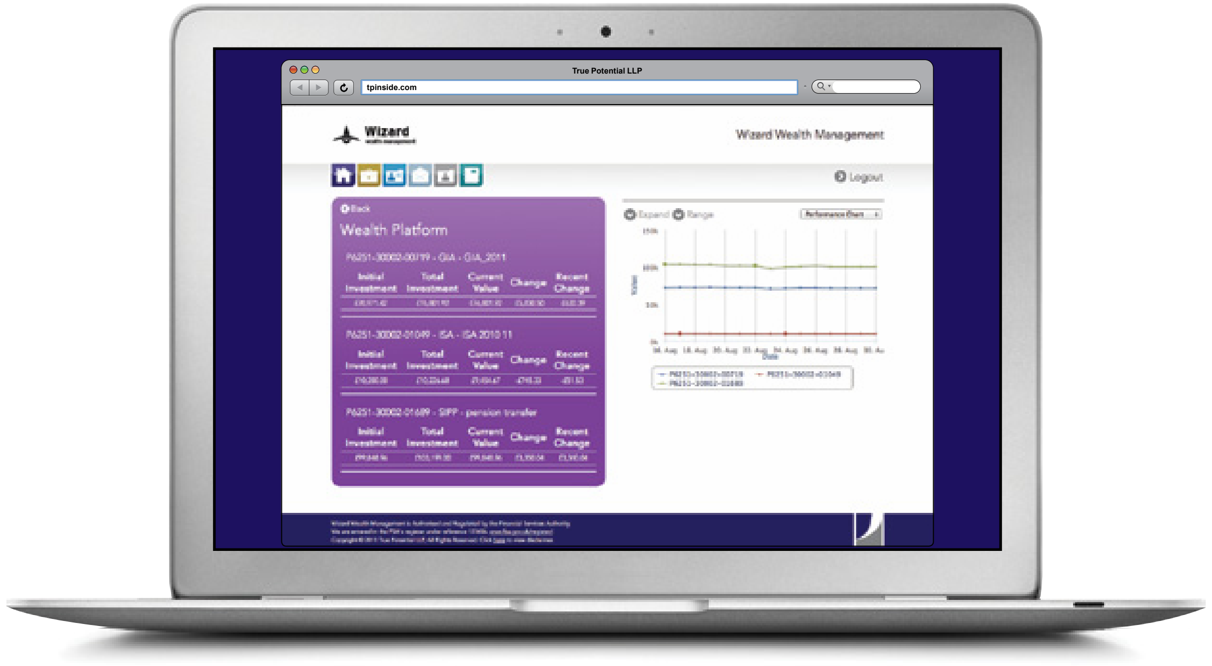
- Review your Wealth Platform, investment other wrap and pension performance.
- Use charting functionality described in Step 4 to further analyse.
- Click a particular account, plan or product to view more information about each portfolio type.
- Click 'Other' to review your details for non-investment and pension plans, plus details of any assets and liabilities that your Financial Adviser may have recorded.

5b. Check your latest valuation via mobile device.

Click My Portfolio.

- Click the £ icon to obtain a current valuation.
- Click the different classes and subsequent plans to obtain more detailed information.
- Rotate the iPhone on its side to view performance history.
- Click the graph icon in Android and Blackberry to view performance history.

6a. Analyse your overall Wealth Platform account.

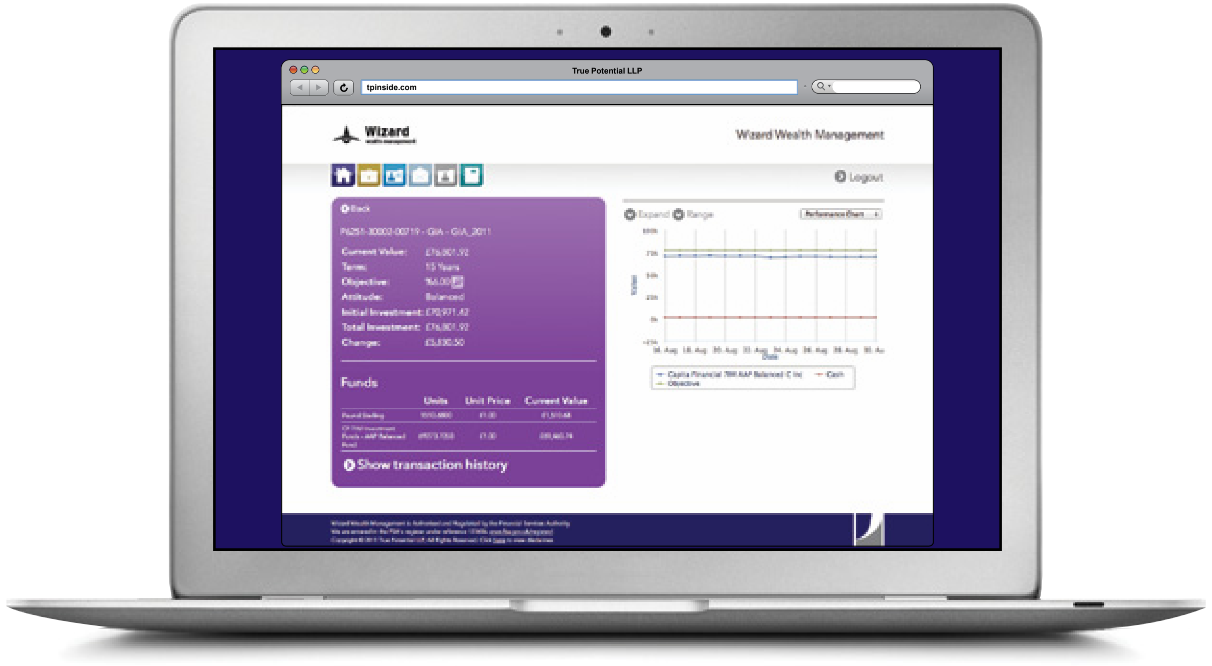


Use this page to view the following information for your Wealth Platform:

Initial Investment:	How much you first invested into this account.
Total Investment:	How much has been invested to date. This includes any regular contributions, top-ups or dividends applied to your account.
Current Value:	The value of your account, applied from close of business, the previous working day.
Change:	The difference between your initial investment and the current value.
Recent change:	The difference between your initial investment and the date range selected.

- Use charting functionality described in Step 4 to further analyse.
- Click an individual account to analyse an account in more depth. See Step 6b. for more information.

6b. Analyse a specific Wealth Platform account.



Review performance across a specific account:

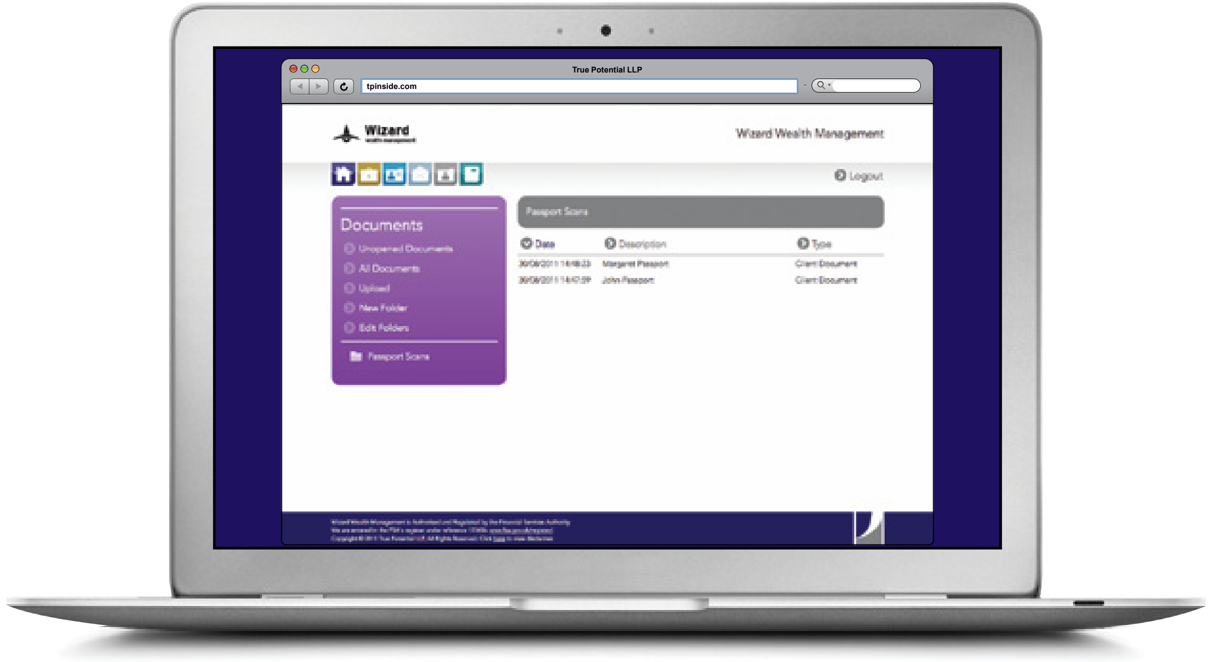
Current value:	The value of your account. Applied from the close of business, the previous working day
Term:	How long you told your Financial Adviser you would like to invest for
Objective:	The amount you told your Financial Adviser you would like to see your investment grow during the term. Click the magnifying glass to show/hide the objective on the performance chart
Attitude:	The attitude to risk that you recorded with your Financial Adviser
Initial Investment:	How much you first invested into this account
Total Investment:	How much has been invested to date. This includes any regular contributions, top-ups or dividends applied to your account
Change:	The difference between your initial investment and the current value

Review the funds that are invested in your account:

Name:	The name of the fund. Click the fund name to open a fund fact sheet to obtain full information
Units:	The amount of units that your account holds
Unit Price:	The value of each unit
Current Value:	The value of this find. Applied from close of business, the previous working day

Click 'Show transaction history' to view a statement of all financial movements within your account.

7. View and sort your documents.



Click the grey 'Documents' button.

All True Potential Wealth Platform documents are held here, along with other files that your Financial Adviser chooses to share with you.

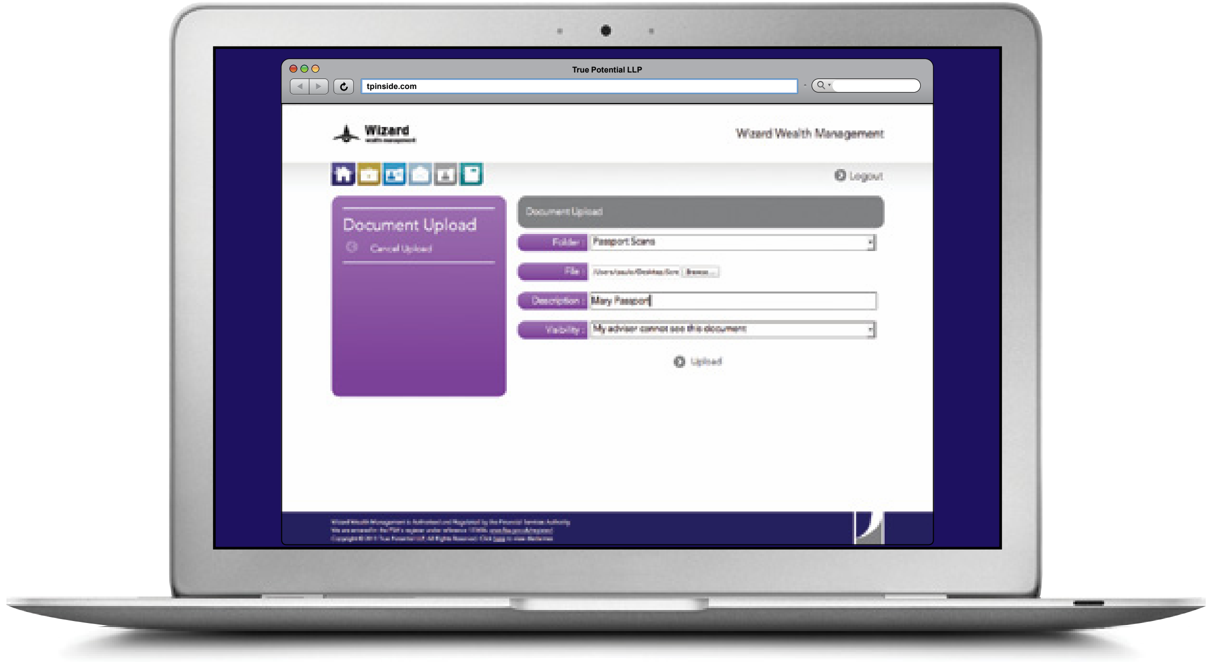
Any documents which have not been viewed will be placed in 'Unopened documents'. All other documents will be placed in 'All documents'.

Click a document to:

Open document:	Opens a PDF version of your document
Add to folder:	Add this document into a folder you have created
Allow adviser access:	Give your Financial Adviser a view of this document (only applicable if you personally added a document)
Delete document:	Removes the document from your view
Close menu:	Closes the menu

- Create a new folder by clicking 'New folder'; enter a name you would like to use and then select 'Create folder'.
- Choose 'Edit folders' to rename or delete any folders you have created.

8. Upload and share new documents.

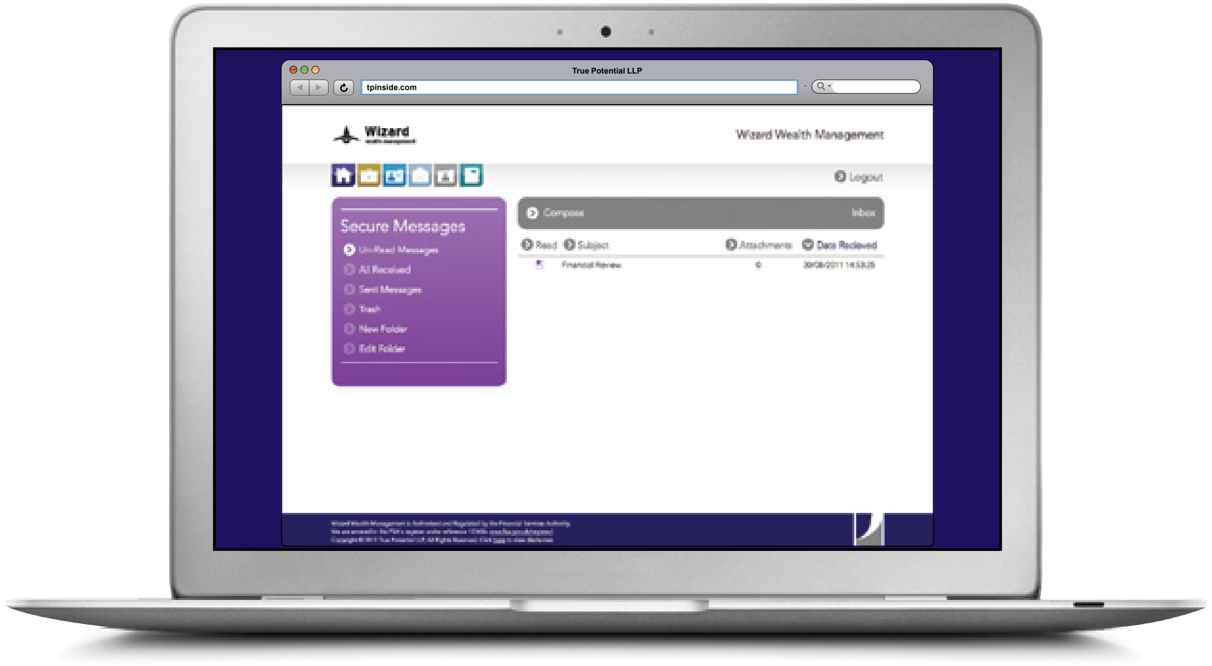


Click the grey 'My Documents' button and choose 'Upload'.

- Upload documents from your hard drive, give a description, allocate to a folder and choose to share or hide from your Financial Adviser.
- Capture information on the move using your smart phone or iPad2*.
- Click the 'allow adviser access' option to share files with your Financial Adviser.

*Supported devices only.

9. Contact your Financial Adviser.



Use Secure Messaging to safely send and receive messages between you and your financial adviser.

- Click the light blue 'Secure Messages' button to compose and read messages.

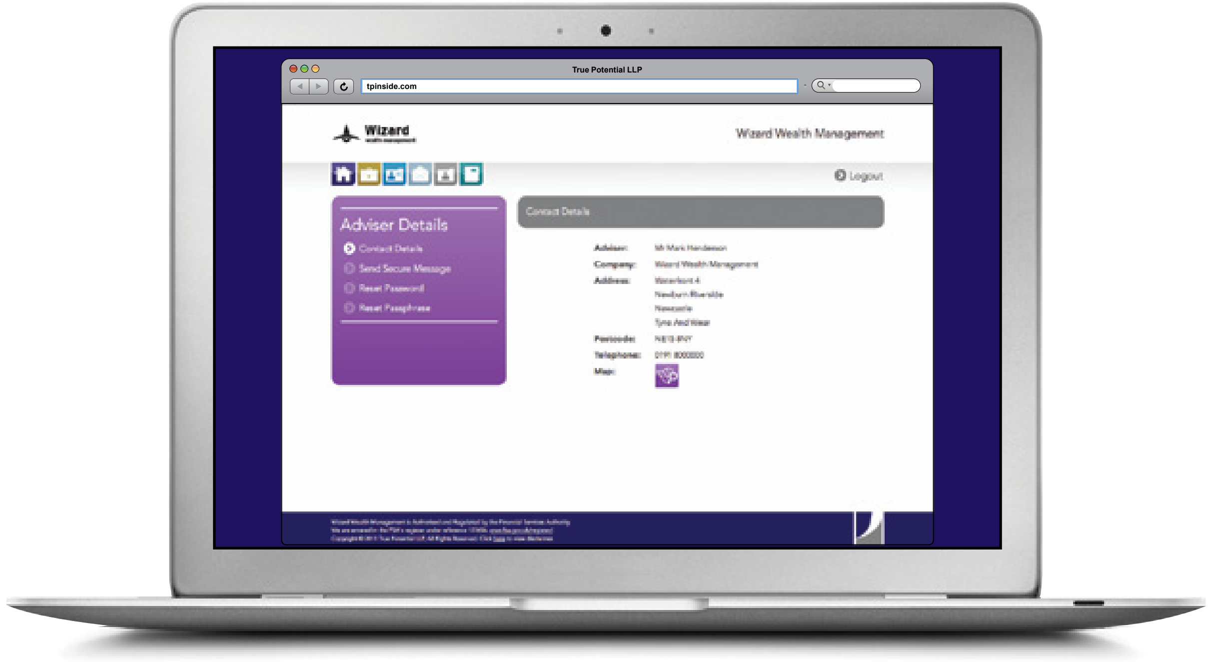
  Any messages which have not been read can be viewed from 'Un-read messages'. All other messages can be found in 'All received'.

  Click a message to:

View item:	Open the message, then reply, delete or mark as unread
Move to folder:	Add the message to a folder that you have created
Close menu:	Closes the menu

- Create a new folder by clicking 'New folder'; enter a name you would like to use and then select 'Create folder'.
- Choose 'Edit folder' to rename or delete any folders you have created.
- You will receive an email notification when receiving a new message.

10. Explore the rest of your site.



The following functionality will work throughout the portfolio pages of your site.

Personal Details: Click to view and update the personal details that your Financial Adviser holds. Any changes made will notify your Financial Adviser.

Contact: Click this option to contact your Financial Adviser in a number of ways.

Logout: Be sure to click 'Logout' when your session is finished.

FAQs

Is my site secure?
Yes, as soon as you log in you are protected with an 128 bit secure socket layer. This is the same encryption that protects your online banking.

My mobile device isn't listed. Can I still view my portfolio?
Yes, we have also developed a mobile HTML version of the site. Simply point your device to https://clientsite.tpinside.com

One of my policies isn't listed. How can I get this on my site?
It is likely that we do not hold the agency rights for this policy or plan. Please contact us and we will arrange to add this.

How often is my portfolio updated?
Every time you log in to your website a new real time valuation is requested. This shows your details at close of business the previous working day.

What does 'Powered by True Potential' mean?
True Potential is the market leader in financial services technology and platforms. By partnering with them we are able to give our private clients exclusive access to the best tools in the industry.

What should you do now?
If you do not already have them, please contact Green Financial for your login details.

What happens Next?

At Green Financial Advice we can provide clients with login details for the Wealth Platform

Please contact us if you need your login details

We can then work together to ensure your portfolio is up to date and you can start using the system

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www.iangreen.com

Other ways to stay connected

LinkedIn: http://uk.linkedin.com/in/ianjamesgreen
Twitter: Follow @ianjamesgreen www.twitter.com/ianjamesgreen
Blog: http://greenfinancial.blogspot.com/
Skype: ianjamesgreen
Facebook: www.facebook.com/GreenFinancial
Have a read, click the 'like' button to receive updates
Post: Hyde Park House, 5 Manfred Road, London SW15 2RS
Find us: http://greenfinancial.blogspot.co.uk/2012/04/directions-to-hyde-park-house.html