

TRPP Wealth Platform v1



Setting up Wealth Platform

- You will need to ensure that we have your up to date mobile number and email address
- Click on the registration link from the email send from no-reply@wealthplatform.co.uk (check junk if you do not receive this). Follow the following steps to register;
 - Click on link, this will take you through to Wealth Platform V1 welcome page
 - Click 'Continue' button and check your mobile number is correct.
 - Enter the SMS verification code sent to your phone as a text message.
 - Please read the terms and conditions and press 'accept'
 - Enter your user name-this must has more than 6 letter/numbers
 - Enter your password
 - Enter your passphrase – please note this down as you are asked certain characters when logging ing every time
 - You will need to choose a **password** with a **minimum of 8 characters, including one symbol and least 1 upper or lower case letter**. E.g **@musTang3** or **#Romsey53**

As a part of vigorous security checks, when you log in with a different device you will be notified of this.

Forgotten Password/ Password reset

- You will be able to reset your password by logging into the Wealth platform <https://www.wealthplatform.co.uk>.
- Please click RESET PASSWORD & PASSPHRSE link and then enter your user name. Please contact the office of you do not know this.
- This will trigger an email to which will allow you to reset your password to gain access. Please note that you have 12 hours before this expires to reset the link. Please check your junk mail if you have not received this. It will come from no-reply@wealthplatform.co.uk.
- Click on the link in the email and it will take you to a RESET SECURITY screen – press continue
- Enter the SMS code that has been text to you and submit
- Reset your password and passphrase – NOTE these are different, and you will need to note these down for future reference.
- This will send you confirmation by text that you r information has been updated
- You can now log into the Wealth Platform.

Please note if at anytime you feel there is a security issue please contact the office and we will be able to block access to the Wealth Platform.

Document Library (statements etc)

- You will be able to access all documents between you and your adviser via the platform
- Fusion wealth will start to save their quarterly statements during 2020.
- All valuations will show online under the assets tabs. Please note that not all providers have up to date valuations. It will depend on what plans you have and what funds you are invested in. please contact your adviser for more information. TRPP will be able to provide up to date valuations if this is required.