TRPP Wealth Platform v2

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 V2 (please note that internet explorer does not support this new platform.
    - Click 'Start Registration' and enter a password. 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**
    - You will receive a SMS code to your mobile phone – please enter this
    - Confirm if you would like to received SMS codes every time you log in for extra security
    - Tick the 'agree to terms & conditions box'
- As a part of vigorous security checks, when you log in with a different device you will be notified of this.

Clients already registered with Wealth Platform

- If you already use Wealth Platform, you will automatically be switched to the new platform. You will no longer need your passphrase.
- Please use the new platform https://www.wealthplatform.com to log in
- Enter user/password

Forgotten Password/ Password reset

- You will be able to reset your password by logging into the Wealth platform https://www.wealthplatform.com.
- Please click FORGOT PASSWORD link and then enter your email/user name. This will trigger an email to which will allow you to reset your password to gain access.

  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 your investments and pensions. **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.

Clients sharing profiles (only V2)

- You will not be able to share email addresses with this new V2 platform but partners can see all of their information via one user if requested.