



# **Logging into your client portal**

### **Step 1: Receiving the 'Request Password email'.**

If you've received this email, it means that your adviser has set you up with a new client record account on the Soderberg platform. Your first step will be to click on the green 'Request Password Email Link' button in your email, as is shown below. There is no expiry on the link in this email.



Hi Harry,


An account has been created for you to access the Söderberg & Partners Wealth Management platform. Please click the button below to request an email which will enable you to set your password. You will be asked to provide your information in the new window that opens.


[Request Password Email Link](#)

If the above button does not work, please paste this link into your browser:

<https://investor-sodbg-0-staging.seccl.tech/requestpassword>

This link will take you through to a web page where you will need to enter in some personal information to verify your account:




[Back to login](#) 

### Reset your password

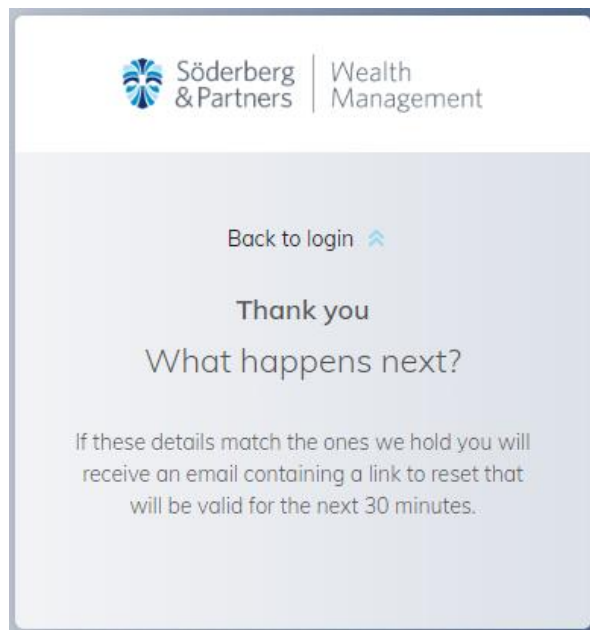
Email Address

Date of Birth

Last Name

 Please note, once you have clicked Submit, for security reasons, you will only have a 30 minute window until the 'Set Password' email expires. Please click submit only if you are intending to action this straight away.

Once entered, you will receive a confirmation message to tell you that the details will be checked against the information held on the platform for you:



If they match then you will receive your second email the 'Set Password Email'.

## **Step 2: Receiving the 'Set Password email'.**

As you did with the first email, you need to click on the green 'Set Password' button in this email as shown below:



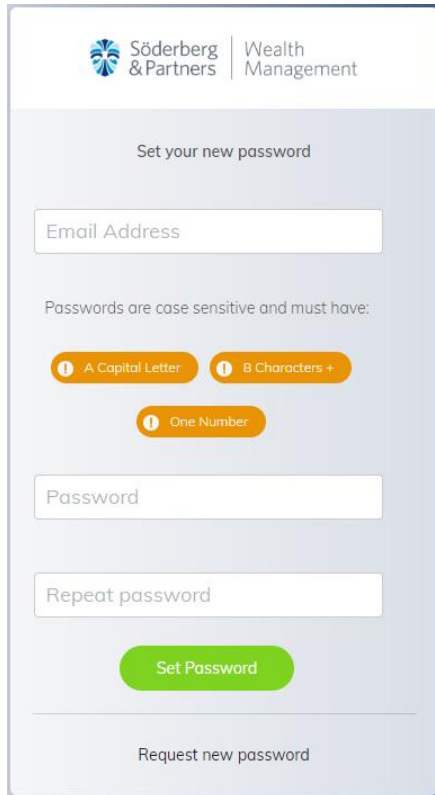
Hi Harry,

We have received a request to set the password associated with this email address.

If you made this request, please click on the button below:

Set Password

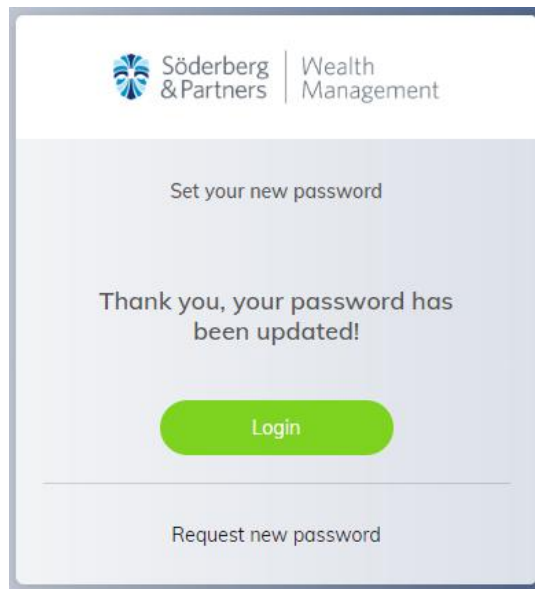
This will take you through to a page where you can set your password. Here's what it looks like:

The screenshot shows a web interface for setting a new password. At the top, the logo for 'Söderberg & Partners' and 'Wealth Management' is displayed. Below the logo, the heading 'Set your new password' is centered. There is an input field for 'Email Address'. Below this, a message states 'Passwords are case sensitive and must have:'. Three orange buttons with white text and icons indicate the password requirements: 'A Capital Letter', '8 Characters +', and 'One Number'. Below these buttons are two input fields: 'Password' and 'Repeat password'. A green button labeled 'Set Password' is positioned below the 'Repeat password' field. At the bottom of the form, there is a link that says 'Request new password'.

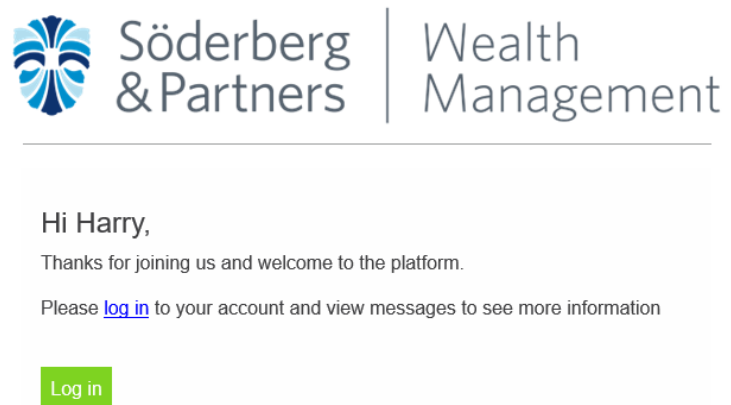
You need to enter in your email address and choose a password that follows the complexity criteria requirements shown in orange. They will turn from orange to green as you fulfil each requirement.

**\*\* Please note that there is a 30 minute expiry on the link in this second email so be ready to action it straight away. If you've run out of time, click on the 'Request new password' button at the bottom of the page shown just above which will take you back through to the browser page from step one where you'll need to verify your details again. You'll receive another 'Set Password email' once verified\*\*.**

Once you're done, you'll be given the following message confirming that you have successfully created your password:

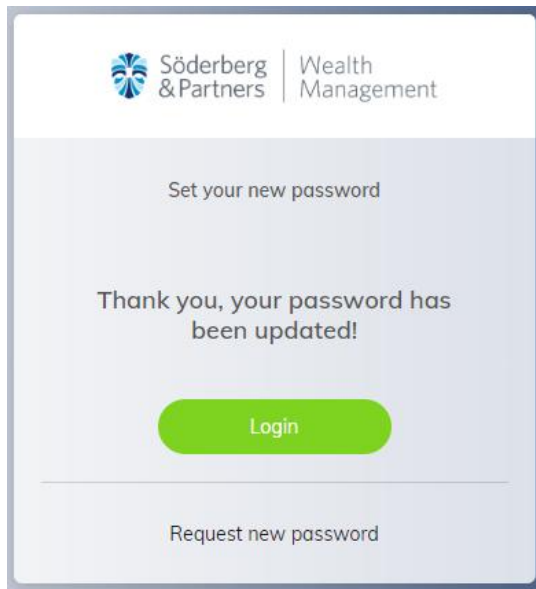


You'll also receive the following email to confirm this as well:

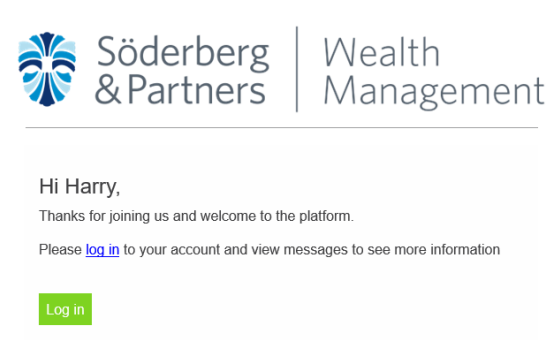


### **Step 3: Logging in**

Then, you can navigate to the login page either from the following window in your browser that you're taken to after you set your password:



Or from the follow-up email that you receive:



Here's what the login page looks like:






Söderberg  
& Partners

Wealth  
Management

Login

Login

[Reset password](#) 

#### Step 4: Accepting Terms & Conditions and Product Declarations

When logging in for the first time, you'll be taken through to your personal details page which will look something like this:



## Check your details and sign

Please check your personal details, then scroll to agree to the platform Terms & Conditions.

### Address

Flat number

Building number

Scroll-down to the bottom of the first page and you'll be able to see the platform Terms & Conditions and product Declarations that need signing:

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### Platform Terms & Conditions

Our terms & conditions outline the service provided and the rules and regulations that govern it.

- Platform Services - a description of what you can do on the platform
- Costs and Charges - a summary of what you will pay to use the platform (please note these are subject to change)
- Custody terms - this explains the services you agree for the custodian to provide to you

☒ I agree

[View the Platform Terms & Conditions](#)

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### Pension Declaration

This is to confirm that you are eligible to join the Scheme and claim tax relief

- Have relevant UK earnings chargeable to income tax for that tax year or
- Are resident in the United Kingdom at some time during that tax year or
- Were resident in the UK at some time during the five tax years immediately before the tax year in question and were also resident in the UK when you joined the pension plan
- You or your spouse have, for that tax year, general earnings from overseas Crown employment

☒ I agree

Below, you can find the Pension Key Features and Pension Declaration links for the pension account: Harry's SIPP; (A05QZLT)

[View the Pension Key Features](#)

[View the Pension Declaration](#)

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### ISA Declaration

This is to confirm that you are eligible to subscribe to your ISA. Your ISA subscriptions to all ISAs must remain within the overall ISA subscription limit in each tax year.  
Please note if you have subscribed to another stocks and shares ISA in this tax year but have transferred all the current year subscriptions from that ISA to this ISA, you can agree to this statement.

☒ I agree

[View the ISA Key Features](#)

[View the ISA Declaration](#)

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[Log off](#)

Confirm

Tick each box labelled 'I agree' to accept the corresponding terms of that section and then when you're ready, click the 'Confirm' button.

## **Step 5: Accepting a Direct Debit mandate, (if applicable)**

Once you've accepted the platform Terms & Conditions and product declarations, there maybe a final page to go through for accepting the Direct Debit mandate:

 Söderberg  
& Partners

Wealth  
Management

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In order for us to make the process of making payments for your investments as efficient as possible we need you to agree to a Direct Debit mandate.


Please note that accepting this mandate does not mean you have to make any payments now.

Payments will only be requested when you make transactions and you will be notified well in advance before any such payments take place. We will take your payment at the next available collection date. If this is your first payment, we need to create a direct debit mandate with your bank before we can collect the first payment. This can take over a week to establish. Should you wish to make a payment sooner please select the bank transfer option.

Depending on when you create a regular payment the first payment may be collected the following month.

If you wish you can skip this step and continue to create an account without agreeing to the Direct Debit mandate.

Instruction to your bank or building society to pay by Direct Debit



Seccl Custody Ltd, 20 Manvers St, Bath, BA1 1JW

Account holder's bank name	HALIFAX
Sort code	XX-XX-11
Account number	XXXX5555
Service user number	184276
Reference	Your account ID
Date	Jan 7, 2025

Banks and building societies may not accept Direct Debit Instructions for some types of

Skip this for now

Accept Direct Debit mandate



Once you've accepted the Direct Debit mandate, you'll be taken through into your client portal account.

## Step 6: Client portal

Here's what your client portal will look like. You'll see an overview at the top with Value, Growth and Uninvested cash which is totalled across all of your accounts, (in this case across Harry's ISA and Harry's SIPP).

Söderberg  
& Partners

Wealth  
Management

Showing all information up to and including January 7, 2025

Mr Harry Potter

Ref: C0657LL | Status: Active

Value£0.00

Growth£0.00

Uninvested cash£0.00

Remaining ISA Allowance£20,000.00

Portfolio

Profile

Messages

Date range (inclusive)

Start date

End date

Run valuation

Harry's ISA

Ref: A05QZLR

TypeISA

Value£0.00

Growth£0.00

Harry's SIPP

Ref: A05QZLT

TypePension

Value£0.00

Growth£0.00

Investments

☐ Show Zero Holdings


Investment	ISIN	Cost	Allocation	Unit	Price	Value	Growth	Growth (%)
No investment data to display								



Total Value£0.00

Total Growth£0.00

You can run valuations by setting dates in the date range section and you can see a break down of investments further down in the 'Investments section.

You can click into each of your accounts, let's take a look at Harry's ISA:

 Söderberg & Partners | Wealth Management



Showing all information up to and including January 7, 2025

### Harry's ISA

Type: ISA | Ref: A05QZLR | Status: Active

Portfolio

Value	£0.00
Growth	£0.00
Uninvested cash	£0.00
Remaining ISA Allowance	£20,000.00

Date range (inclusive)

Start date

End date

Lastly, you can view other sections of your client portal account by click on the 3-lines icon in the top right hand corner:

