Söderberg & Partners

Logging into your client portal

<u>Step 1: Receiving the 'Request Password email'.</u>

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.

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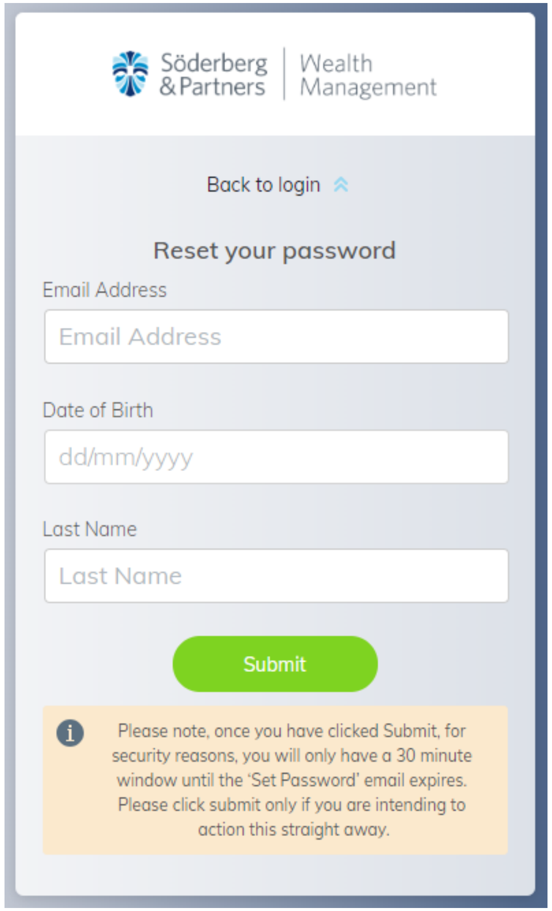
Hi Harry,

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.

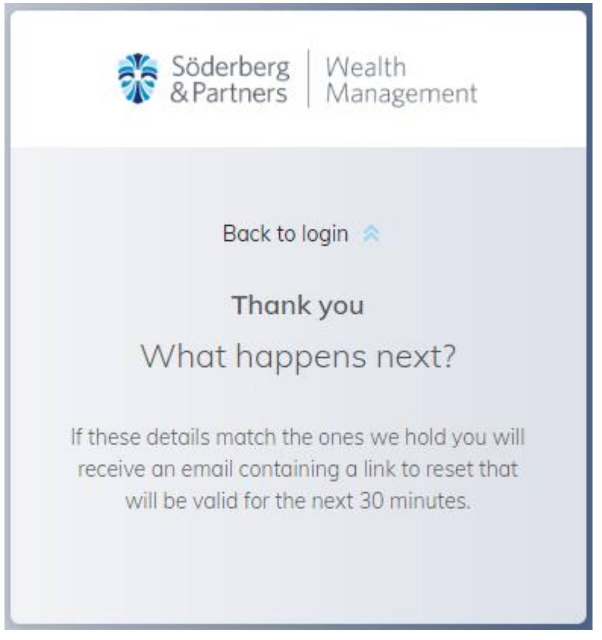
Request Password Email Link

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:



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:

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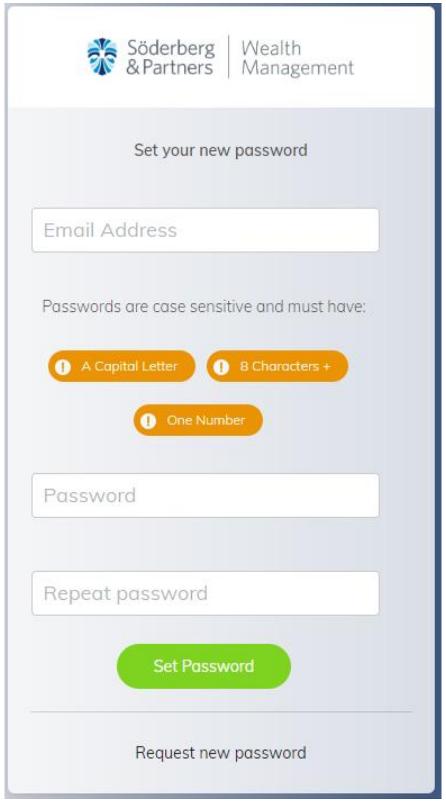
Hi Harry,

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

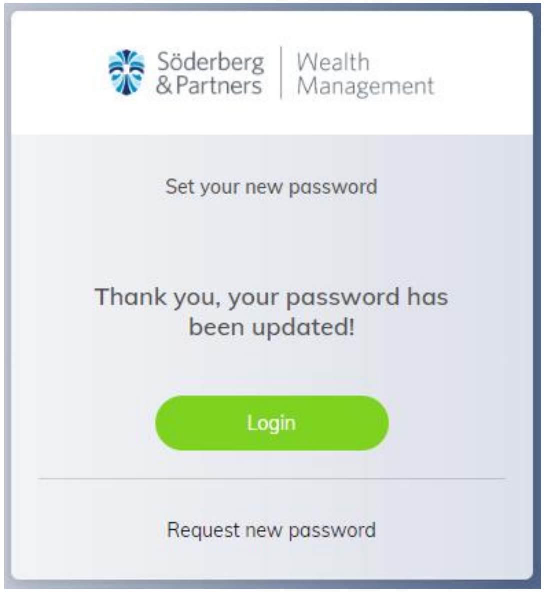
This will take you through to a page where you can set your password. Here's what it looks like:



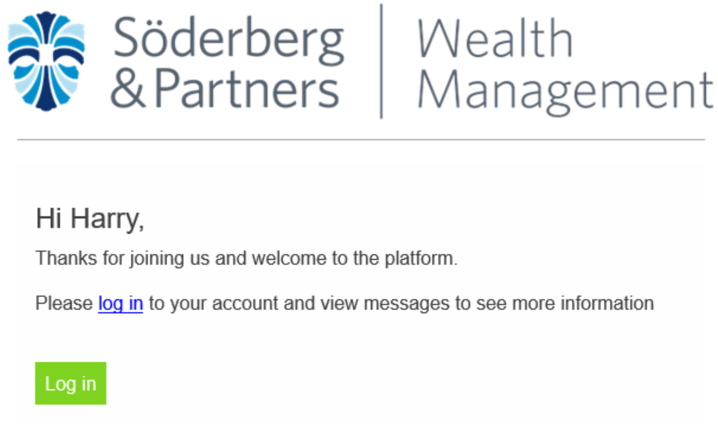
You need to enter in your email address and choose a password that follows the complexity criteria requirements shown in orange. They will turn from orange to green as you fulfil each requirement.

** 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:

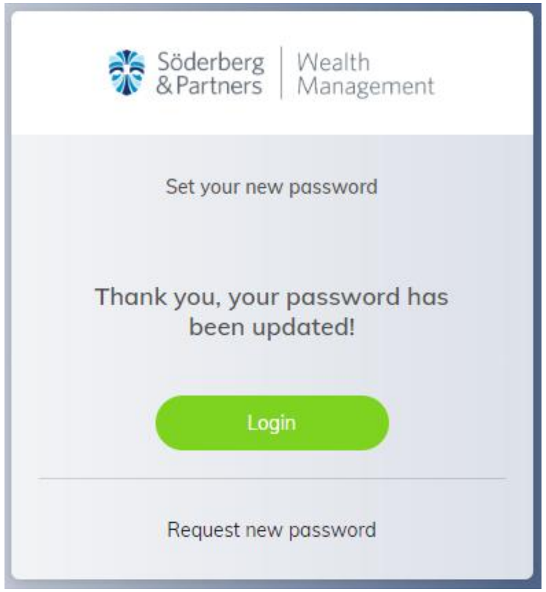


You'll also receive the following email to confirm this as well:

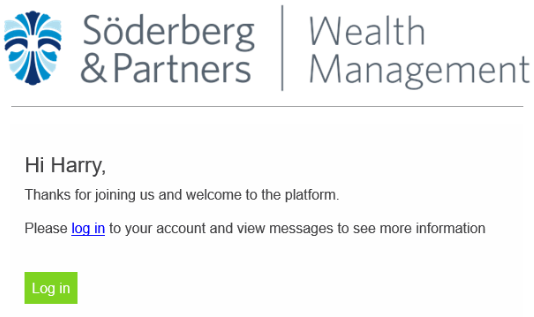


Step 3: Logging in

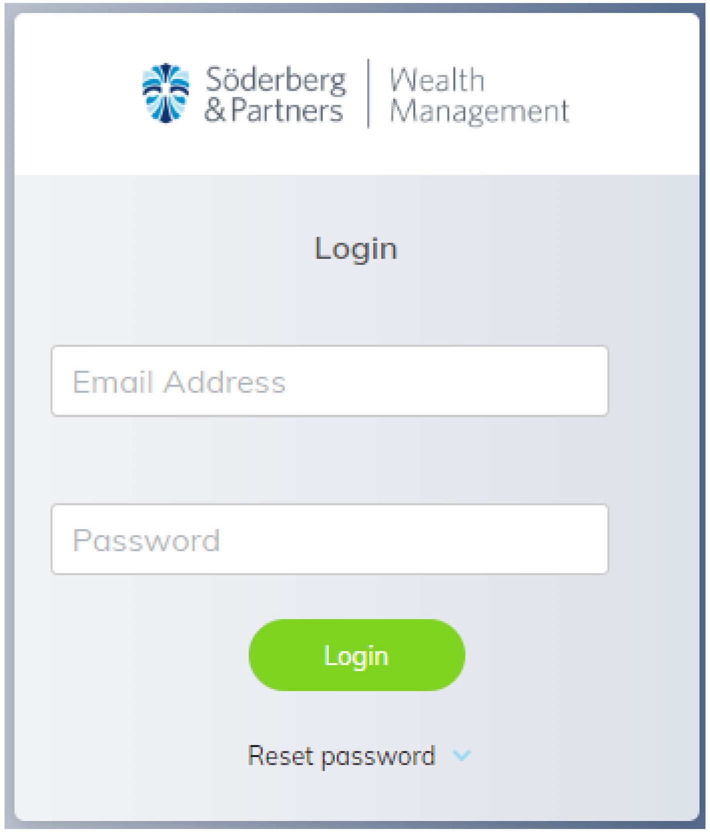
Then, you can navigate to the login page either from the following window in your browser that you're taken to after you set your password:



Or from the follow-up email that you receive:

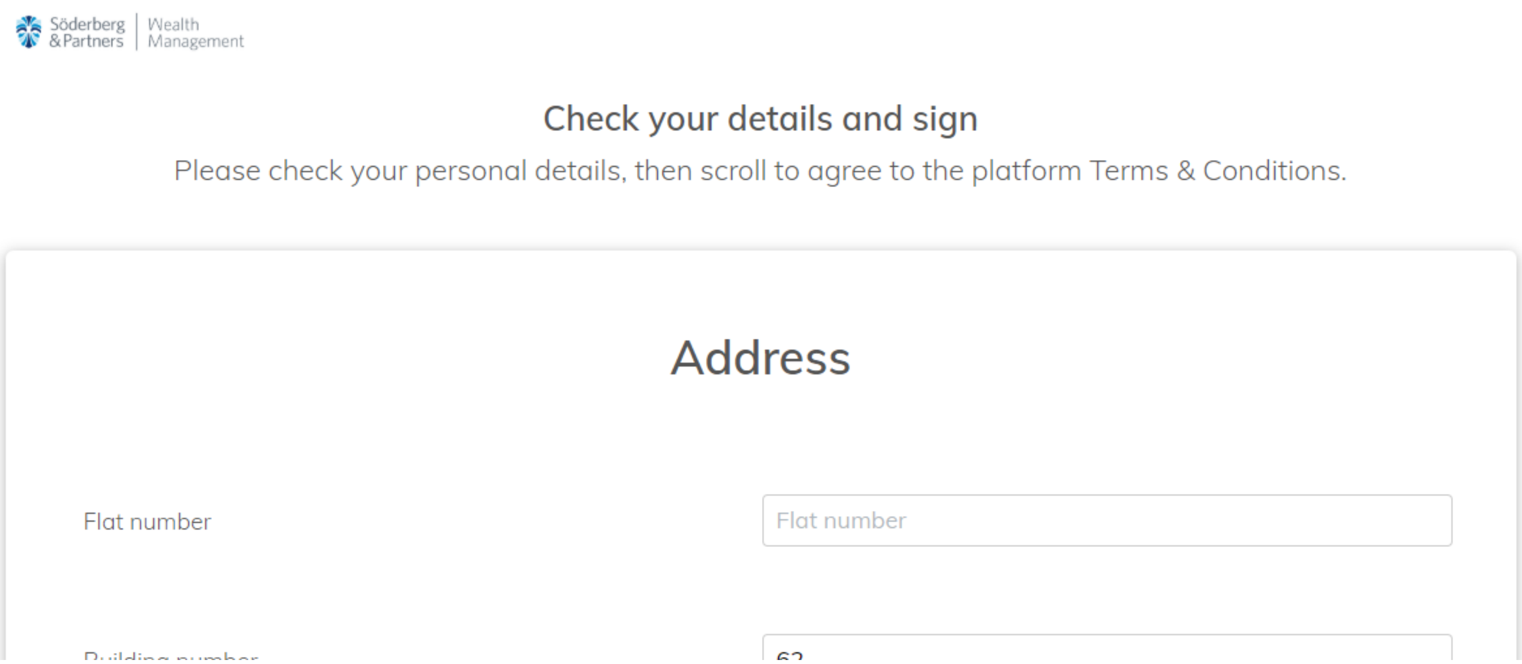


Here's what the login page looks like:

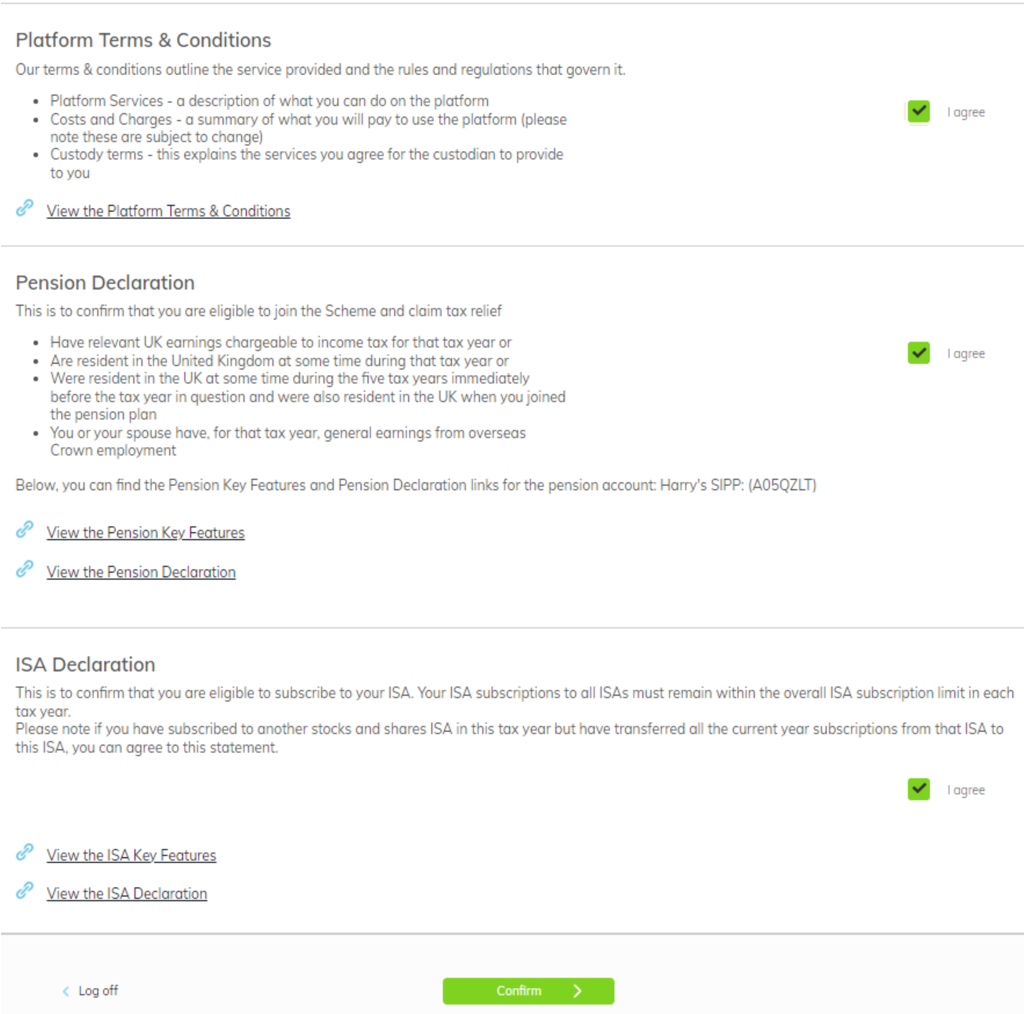


Step 4: Accepting Terms & Conditions and Product Declarations

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



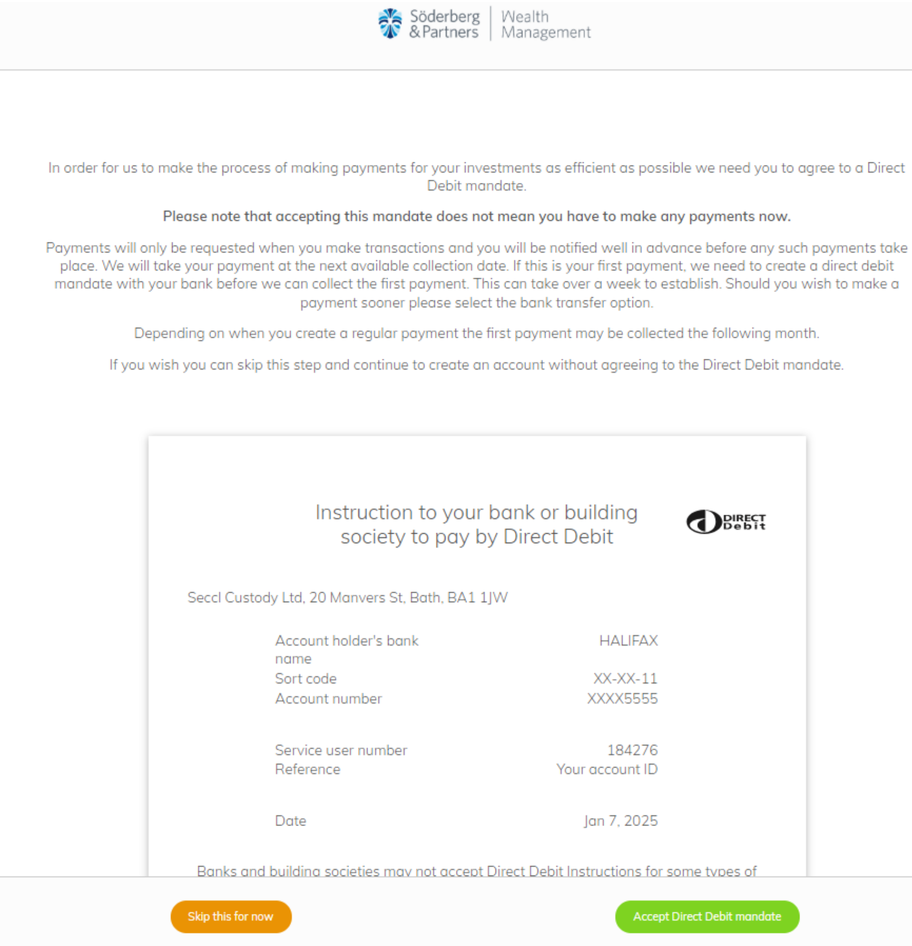
Scroll-down to the bottom of the first page and you'll be able to see the platform Terms & Conditions and product Declarations that need signing:



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:



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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

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

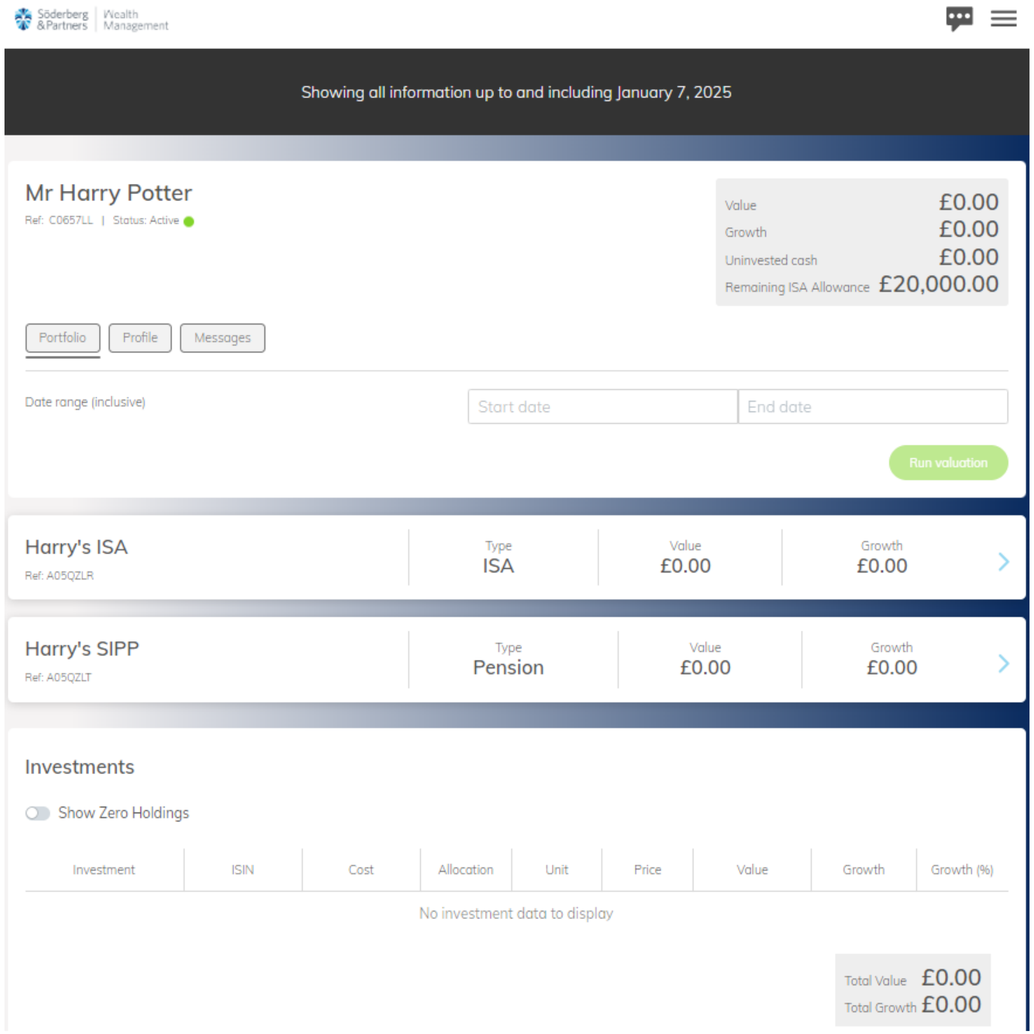
Skip this for now

Accept Direct Debit mandate

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

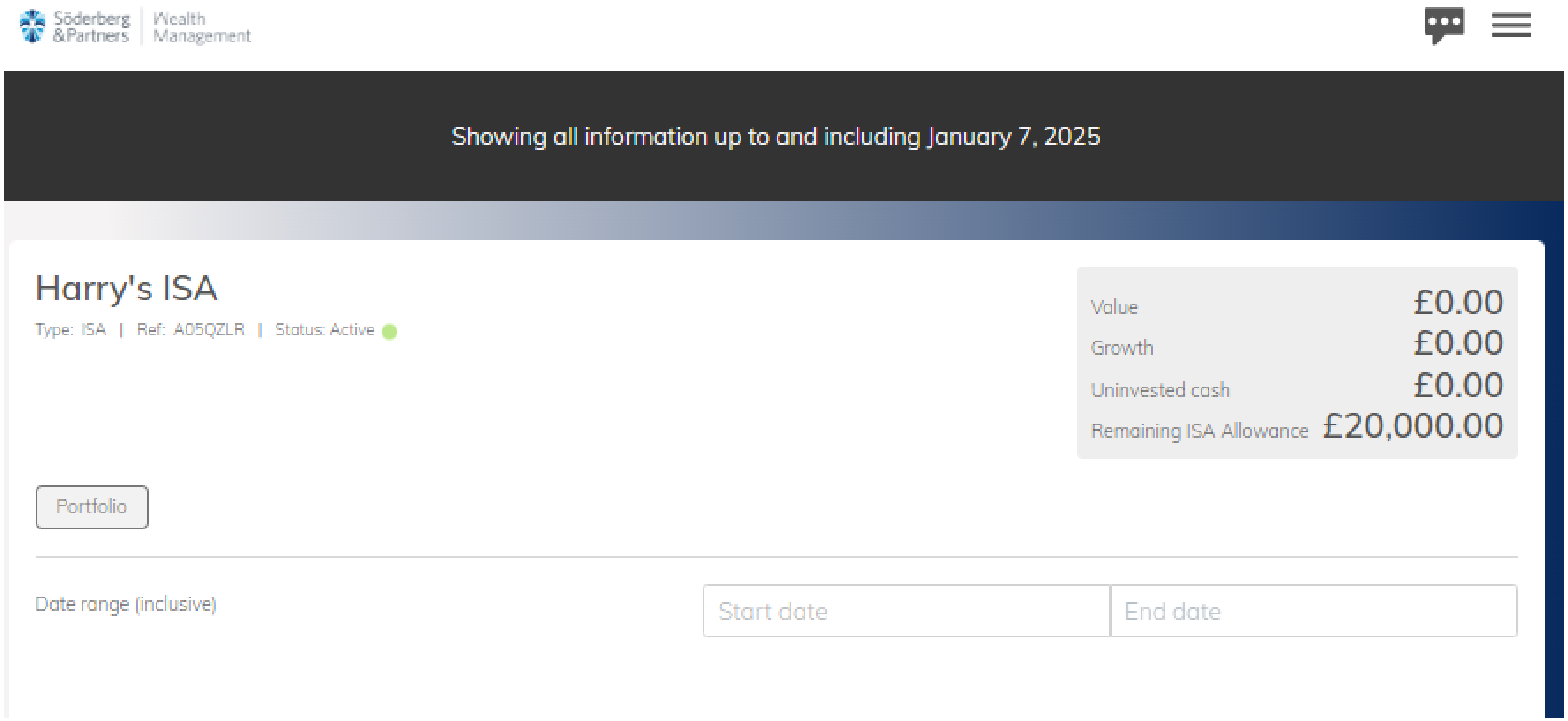
Step 6: Client portal

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).



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:



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