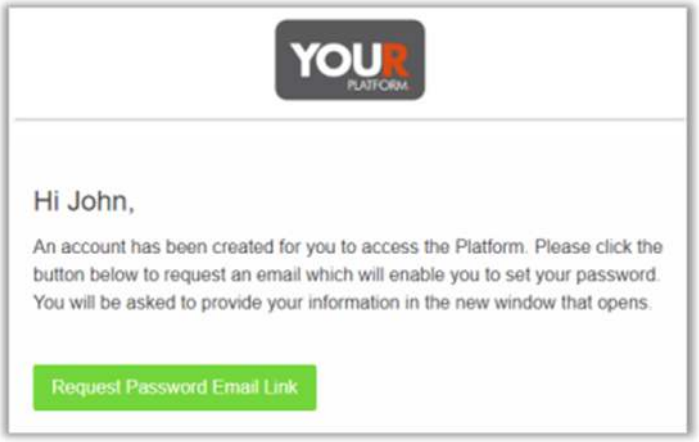
Setting up your Account

YOUR Platform provides access to the latest valuations for Investors and their Advisers. Once your Adviser confirms with you that you wish to open an account, they will set up your access to the platform and your investment account(s). We will communicate any changes made to your account, as well as provide regular updates via your online message store. You will receive an email when a new message has been sent.

This guide shows you what you need to do to confirm these accounts and get access to the platform.

Step by step

- You will receive an email from YOUR Platform Notifications with a link in it, to begin the process (it will say 'Request Password Email Link'). This link won't expire, but for your account to be opened promptly, please click on the link as soon as it is convenient to do so.



- On clicking the link, you will be asked to confirm your email address, date of birth and surname

- Once submitted you will receive a second email from 'YOUR Platform Notifications', this email contains a link you will need to click on within 30 minutes

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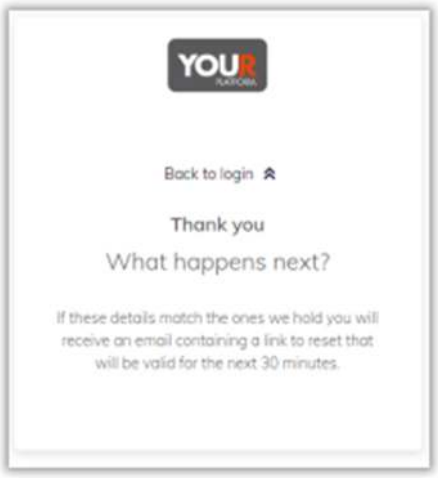
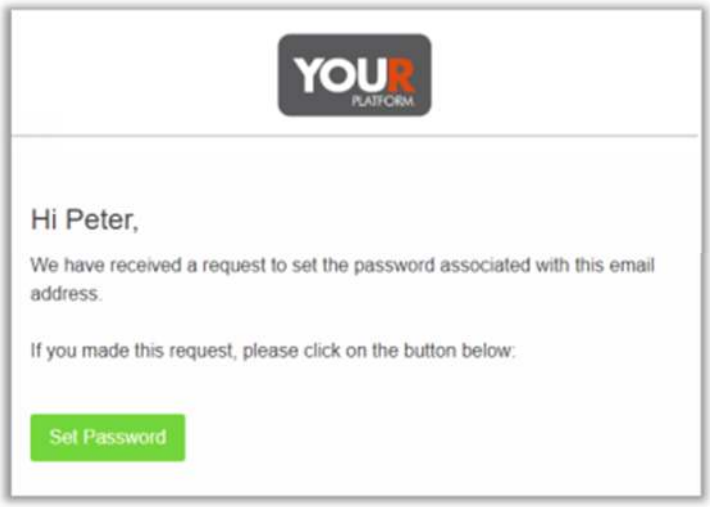


- Clicking on this link will open a page where you will confirm your email address and choose a password



- Once completed, you will be emailed to confirm the set-up of your account. You will now be able to log into your account, agree Terms and Conditions and see any messages you may have

- The first time you log in (at **https://investor.YOUR-Platform.co.uk** or via the main website **www.YOUR-Platform.co.uk**) you will be given a summary of your details and asked to review and agree the platform Terms and Conditions and the Key Features Documents of any tax wrapper accounts you have been advised to open. Be aware that your accounts will not be active and ready to be funded until you have accepted these terms

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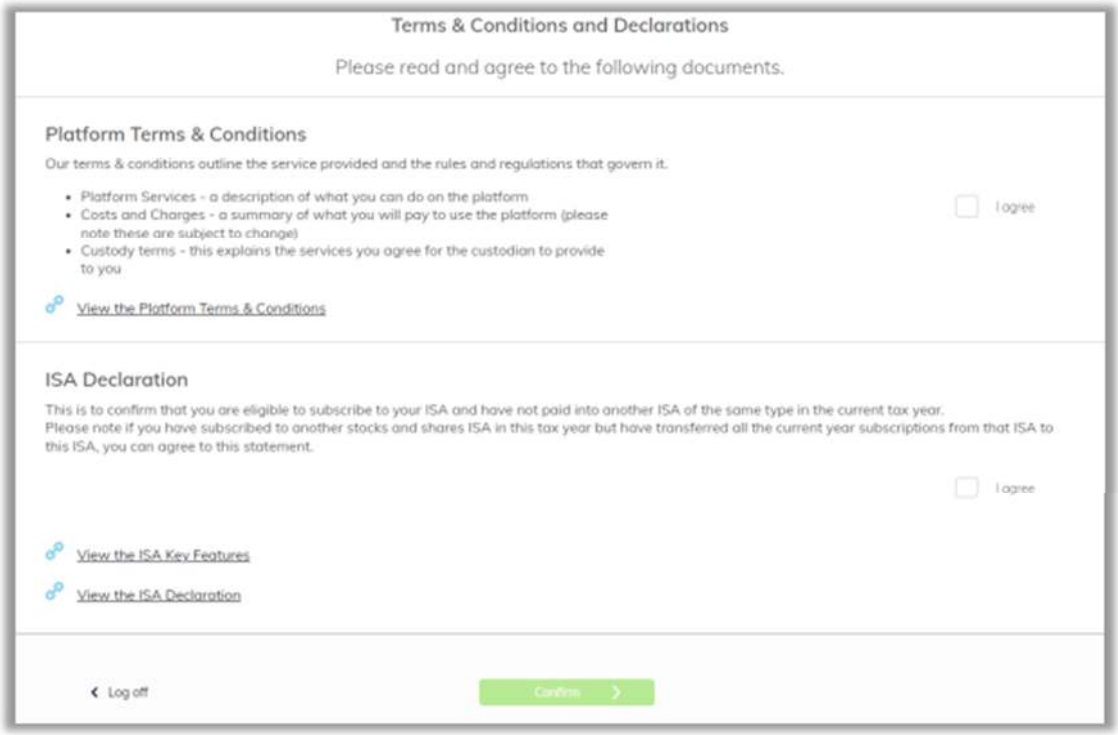

- Once you confirm your details, you will enter your platform account, and you will be able to navigate your accounts, messages, and profile information.

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