

CLIENT PORTAL GUIDE

Introduction

The Client Portal is a smart and convenient way for you and your adviser to stay in touch.

The key features are:

- Safe, secure method of communicating
- Safe, secure method of sharing and exchanging confidential documents
- Ability to electronically sign certain documents to save time and travel
- Available via mobiles, tablets, desktop and laptop computers

Getting started

Your financial adviser will send you two emails which will give you access to the Client Portal. If you do not receive them, please check your spam/junk folders (and mark as 'not spam/junk' for future reference) before contacting your adviser.

The first email will confirm the Username you have been given along with a hyperlink to the Portal site (a 'clickable' word that will automatically take you to the right place).

Dear James

Access to our Client Online Portal has been enabled for you.

To access the Portal you will need to login using a username and password. Your username is below and you will receive your password shortly via a separate email.

Your username is: **James.Senior3**

You will be asked to change your password when you first login. Also, you will be required to set up two security questions (along with answers) so that you may reset your password should the need arise.

You have 48 hours to use these details before they expire. If you miss this window, please email administration@medicalfamilyfinance.co.uk or call 020 7252 5765 to ask to be sent new login details.

Clicking **here** will take you to the Portal. It is recommended that you save this to your favourites for future convenience.

The second email will confirm the initial password you have been given.

Please note your initial password is only valid for 48 hours. If you miss the 48-hour window or if you encounter any error messages, please let us know and we will be happy to generate new login details for you.

Dear James

Below you will find your password to login into our Client Portal. Your username & a link to the Portal have already been sent to you in a separate email.

Password: **h1+%4LGq**

You will be asked to change your password on your first login to the Portal. Also, you will be required to set up two security questions (along with answers) so that you may reset your password should the need arise.

Please email administration@medicalfamilyfinance.co.uk or call 020 7252 5765 should you have any issues logging in.

Please now click on the link which takes you to the Client Portal site.

At the log-in page of the Portal

The screenshot shows the login interface for Medical Family Finance. At the top is the logo. Below it are two tabs: 'Client' (selected) and 'Adviser'. The 'Username' field is labeled 'Typically 'firstname.lastname99' or 'numeric'' and contains the text 'James.Senior3'. The 'Password' field is masked with dots. A 'Show password' checkbox is to the right of the password field. A dark grey 'Login' button is at the bottom. A link 'Help with logging in' is below the button. Three blue dotted arrows point from text labels to the form: 'Add your username' points to the username field, 'Add your password' points to the password field, and 'Click 'Login.' points to the Login button.

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Client Adviser

Username
Typically 'firstname.lastname99' or 'numeric'

James.Senior3

Password
.....

Show password

Login

Help with logging in

Add your username

Add your password

Click 'Login.'

When you log in for the first time

The screenshot shows the 'ADDITIONAL VERIFICATION' screen. It has the Medical Family Finance logo at the top. Below the logo is the heading 'ADDITIONAL VERIFICATION' in blue. The text explains that additional security is required and asks the user to choose a verification method. Under 'Verification method', there is a radio button (which is selected) next to 'Email (j****s@jamesseior.net)'. At the bottom, there is a dark grey button labeled 'Select and continue' and a link 'Return to sign in'.

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ADDITIONAL VERIFICATION

For additional security we require you to also do additional verification before your log in. Please choose method of verification below.

Verification method

☒ Email (j****s@jamesseior.net)

Select and continue

[Return to sign in](#)

When you log in for the first time you will be required to set up Two Factor Authentication (2FA). This will give added security by requesting two methods that verify your identity. The options you will see are determined by the email address and mobile phone numbers your adviser holds for you. Please choose your preferred method to be contacted – either a text message or an email and click 'Select and continue'.

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VALIDATE YOUR DEVICE

We just sent you a message with your authentication code. Enter the code from the message below to validate your device.

Security Code

Authenticate and continue

[Return to sign in](#)

You will now receive either an email or text message with a verification / security code depending on the method chosen. Please re-key this code here and click 'Authenticate and continue' to proceed.

Enter the code here

The first code will successfully validate the device and a second code will be sent. Enter this code here and click 'Authenticate and continue' to proceed.

Please note second and subsequent log ins will only require one validation / security code to gain access.

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✓

Your email has been successfully validated.

ADD SECURITY CODE

We've sent one more message with an authentication code. Please enter the code from the message below to continue logging in.

Security Code

226007

Authenticate and continue

[Return to sign in](#)

Enter the code here

Change the original password

Next you will be required to change the original password set by your Financial Adviser to one of your choice. This password will be unique to you and must not be shared with anyone else. Your password must be at least 8 characters long and contain a character from at least three of the following four categories:

- Digit
- Upper Case letter(s)
- Lower case letter(s)
- Punctuation

The screenshot shows a 'CHANGE PASSWORD' form. At the top, it says 'CHANGE PASSWORD' in large blue letters. Below that, it says 'Please enter your new password' followed by a password input field with dots. A blue arrow points from the text 'Enter your new password' to this field. Below the input field is a 'Show password' button with a small square icon. Below that is a green progress bar and the text 'Password strength: Strong'. At the bottom of the form is a dark grey button labeled 'Confirm password'. A blue arrow points from the text 'Click 'Confirm password'' to this button. At the very bottom of the form is a link that says 'Return to Login'.

You will be invited to set up two security questions. This is to allow you to reset forgotten username / passwords easily without the need to contact your financial adviser.

The screenshot shows a 'SET SECURITY QUESTIONS' form. At the top, it says '+MEDICALFAMILYFINANCE' in blue and black. Below that, it says 'SET SECURITY QUESTIONS' in large blue letters. Below that, it says 'Choose your first security question'. There is a dropdown menu with the text 'What is the name of the street you grew up on?' and a checkmark icon. Below the dropdown is an input field for the answer, which contains the text 'Brian Street'. Below that, it says 'Choose your second security question'. There is another dropdown menu with the text 'What is the name of your first pet?' and a checkmark icon.

Please note even if you have chosen a text message as your preferred Two Factor Authentication option above, all password reset codes are sent via an email.

You are now successfully logged into the Portal.

Should you encounter any issues or need further assistance please email Marie or Emma at marie.jean-pierre@medicalfamilyfinance.co.uk or emma.ireo@medicalfamilyfinance.co.uk or telephone 020 7252 5765 and they will be happy to help.

Introduction to using the Xplan Client Portal

You will arrive at the 'inbox' by default (if not click on 'Messages and Documents' at the top of the screen) where you can see new messages along with any old ones that your adviser has sent to you. Please note that your adviser will usually send you an email to tell you that we have put a new message in your portal, so it is important that we have your current email address and you keep us informed of any changes.

You can respond to any message by clicking 'Reply.'

In addition to what you can see in the inbox use the other menu sections to review messages flagged as Important only, your sent items and messages sent by your adviser that you have been asked to digitally sign.

The screenshot shows the 'MESSAGES AND DOCUMENTS' interface. On the left sidebar, 'Compose' is highlighted. The 'Inbox (2)' section shows two messages: 'Welcome to Your New Client Portal' and 'Client Portal Access Password'. The 'Client Portal Access Password' message is selected, and its details are shown on the right: 'WELCOME TO YOUR NEW CLIENT PORTAL', Created: 16 May 2023 11:27, Reference date: 16 May 2023. The message body states: 'The following email message was sent to "Senior, James" <js@jamesse... May 2023 at 11:27 by administration@medicalfamilyfinance.co.uk.'

To send a new secure message to your adviser including any attachment(s) click 'Compose'.

This screenshot is identical to the previous one, but the 'Compose' button in the left sidebar is highlighted with a red rectangular box to draw attention to it.

Complete the 'Subject' and 'Message' boxes. **Attach document(s)** as desired by clicking 'Add.'

When ready to send click 'Send a message.'

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MESSAGES AND DOCUMENTS

MY ACCOUNT

MEDICAL
FAMILY
FINANCE

NEW MESSAGE

Subject

Attachments

Add

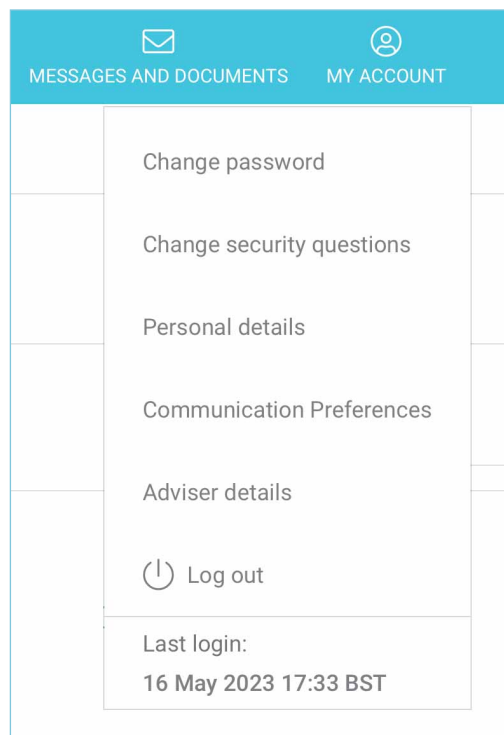
Message

Enter message here...

Cancel

Send a message

Other functionality



Click on 'My Account' to:

- change your password
- change your 2FA preferences (email or text message)
- change your security questions
- check your personal details
- update your marketing preferences
- view your adviser's details

If you have any further questions, please contact our client services team, Marie or Emma at marie.jean-pierre@medicalfamilyfinance.co.uk or emma.ireo@medicalfamilyfinance.co.uk or telephone 020 7252 5765 and they will be happy to help.