

## How to Download and Return documents through the Client Portal

- 1) When sent documents through the client portal you will receive an email. If this is your first time using the portal it will look like this:

This email has been sent to \_\_\_\_\_ which is the address you should use when logging in. Please do not reply to this email. This mailbox is not monitored and you will not receive a response.

This pack of documents will be available in the Portal for 30 days and 23 hours.

The Portal is a secure and audited document distribution and management system used by Acumen Financial Planning Ltd to allow you to receive and digitally "sign" documents from within your own individual secure portal. The digital signature legally replaces a physical signature on a piece of paper.

### **Account Activation**

Before you can access the pack of documents, you will need to follow our simple account activation process within 5 days of the date of this e-mail:

1. [Click on this link](#) - your browser should open and display the Virtual Cabinet Portal account activation page. A lot of the information is filled in for you - you just need to complete anything that's missing.
2. Your password must be at least 7 characters long and contain at least one upper case letter, one lower case letter and one digit. Choose something easy to remember, but difficult to guess.
3. Once you have completed all of the missing information, click on the 'Activate account' button and you will be able to see the pack of documents you have been sent.

Click on the link and it will take you to the Account Activation page

Simply enter your email address and create a password and hit 'Next'



### **Activate your account: Step 1 of 2**

#### **LOGIN DETAILS**

#### **PERSONAL DETAILS**

Welcome to our secure portal

Our portal allows us to communicate with you efficiently and securely.

You need to create your own password and activate your account before you can access the information we have sent you.

Email address

info@acumenfp.com ✓

Password

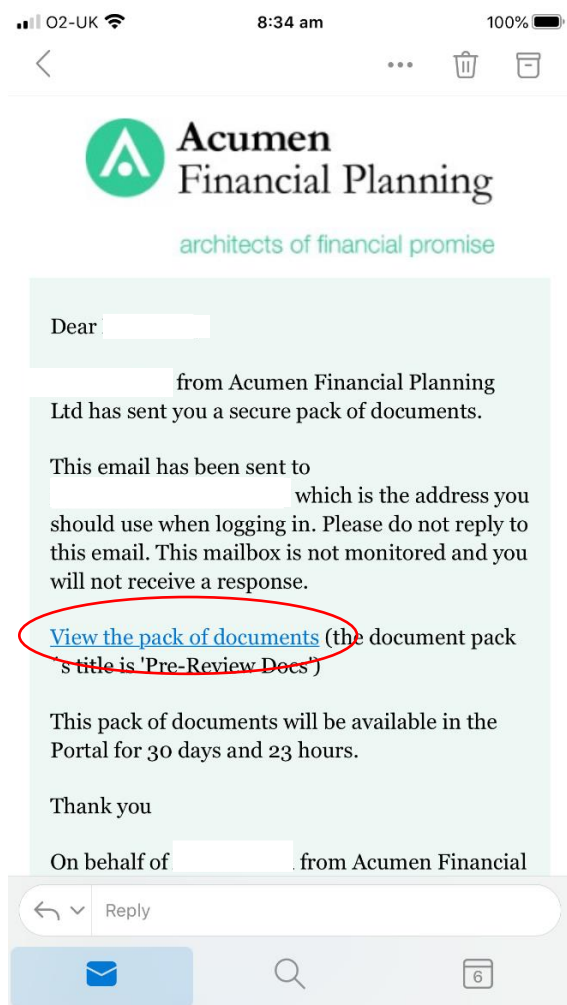
Your new password

Confirm your new password

**Next**

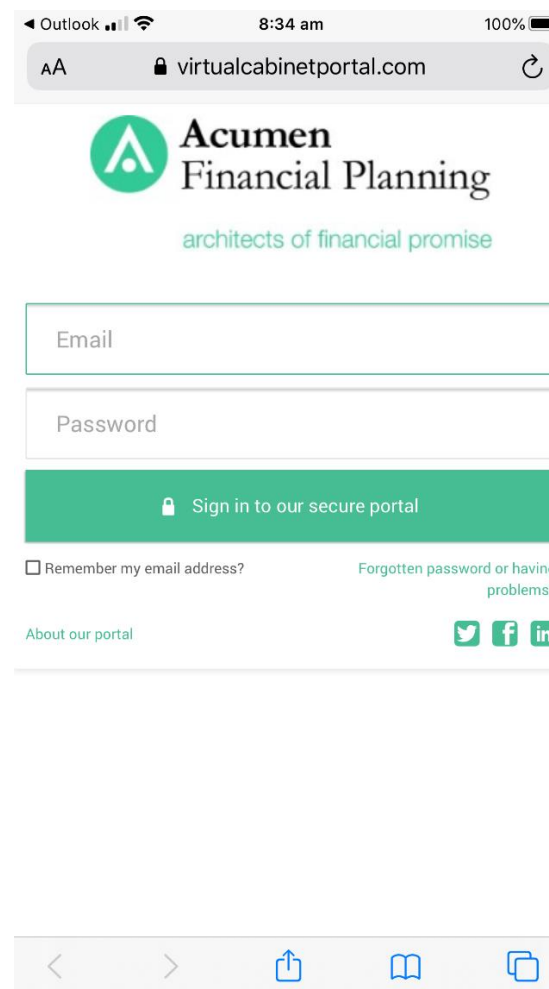
[About our portal](#)

If you have used the portal before, your email will look like this:

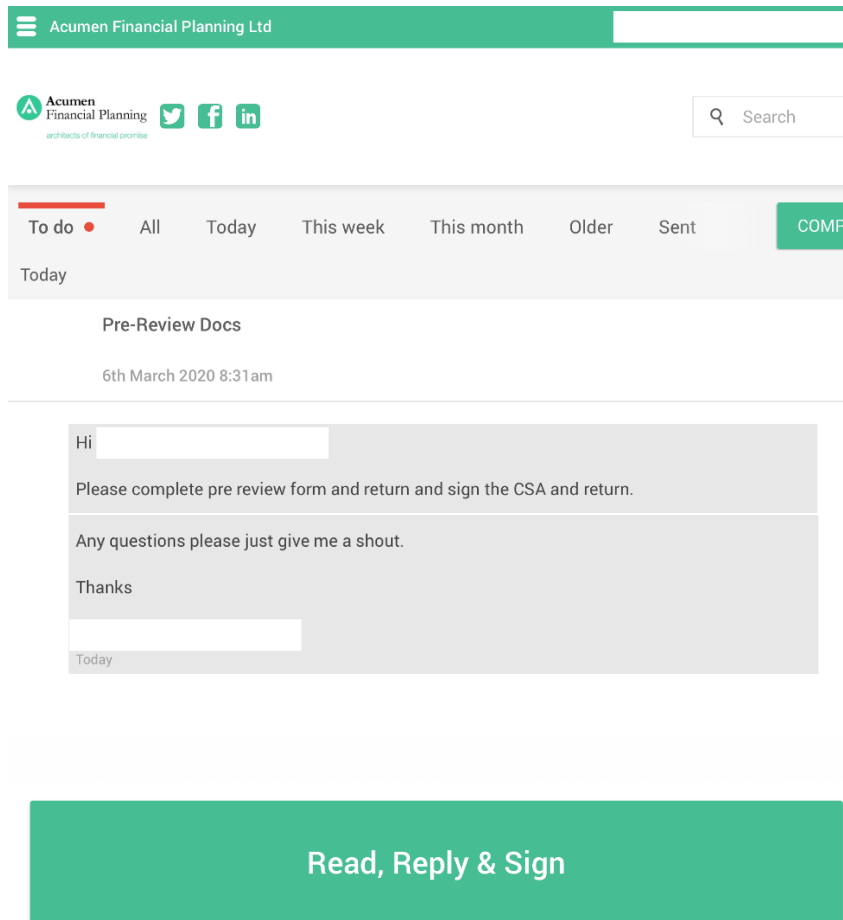


Click on 'View the pack of documents'

- 2) This will then take you to the log in page. Enter your email address and Password and click on the Sign in button

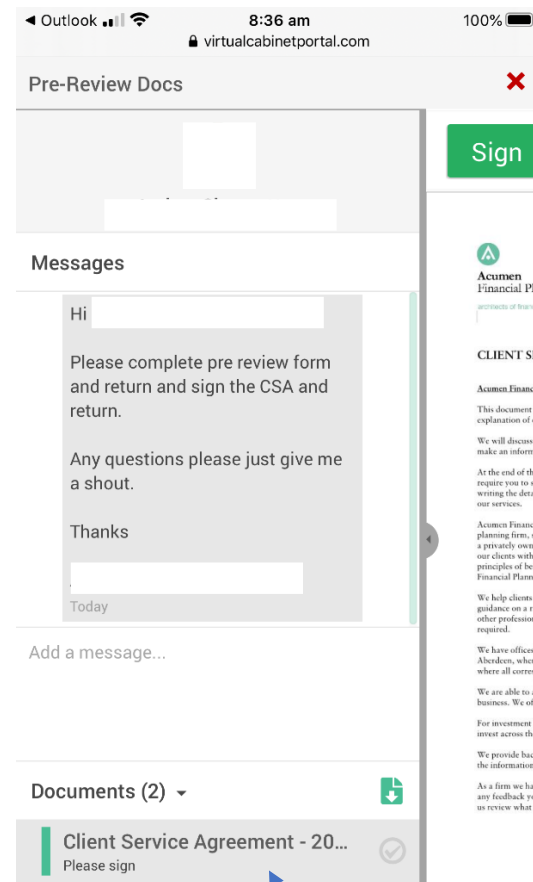


- 3) Then if on an iphone or tablet it's best to turn your phone landscape. You will see this page:



Scroll the bottom of the page and click on Read, Reply & Sign

- 4) This then takes you to this page



Click on the document name

- 5) This opens the document, please read it and sign it by clicking on the 'Sign' button

Outlook 8:36 am 100%  
virtualcabinetportal.com

Pre-Review Docs  
Client Service Agreement - 2020

**Sign** **Decline**

Contact addresses

- 4 Kinghill Park, Venture Drive, Arncliffe Business Park, Westhill, AB32 6FL (Head Office)
- 8 Randolph Crescent, Edinburgh, EH3 7TH
- 26 Hay Street, Elgin, IV30 1NQ
- Acumen House, Grange Road, Peterhead, AB42 1WN
- Commercial House, 2 Rubislaw Terrace, Aberdeen, AB10 1XE (Registered Office)

Communications Consent

We provide clients with an email newsletter up to four times a year. This contains relevant information about events, changing legislation and general information about the firm. Over and above this, we may send you information via email regarding selected topics such as but not limited to Pension Legislation, Capital Gains Tax, Inheritance Planning, Investments, Events, Client Feedback Surveys etc. that may be of interest or applicable to you.

You can opt out of such emails at any time, but please be aware in that doing so will stop any future information that may be of interest being received via email. This information is in addition to any direct communication from your planner.

a.	If you wish to receive such information from us please select this box to opt in. (Should you prefer to receive such information by post, please select this box.)	Client 1 <input checked="" type="checkbox"/>	Client 2 <input checked="" type="checkbox"/>
b.	If you do not wish to receive any such information from us please select this box to opt out.	<input type="checkbox"/>	<input type="checkbox"/>

(Where you have previously indicated your communication preference you do not need to provide confirmation again, unless your preference has changed.)

Your Consent

This is our standard retail client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing below. If you do not understand any point please ask for further information or clarification.






Signed \_\_\_\_\_ Date 29 October 2019  
For and on behalf of Acumen Financial Planning Limited

I/We confirm receipt of and my/our agreement to the terms contained in this Client Agreement and further acknowledge that I/we have been given at least 24 hours in which to consider my/our acceptance.

I/We authorise the transfer of information, on a confidential basis when warranted between any necessary third parties. I/We acknowledge that this Client Agreement will come into effect from the date of issue.

Name \_\_\_\_\_ (Client 1)  
Signed \_\_\_\_\_ Date \_\_\_\_\_  
Name \_\_\_\_\_ (Client 2)  
Signed \_\_\_\_\_ Date \_\_\_\_\_

Business Process of Monitoring of Client Financial Information

- 6) If using you're the portal on your iphone or tablet you may be asked to do a security check. This message will appear. Click on 'OK, got it!'

Outlook 8:37 am 100%  
virtualcabinetportal.com

Pre-Review Docs  
Client Service Agreement - 2020

**Security Check**

We have emailed you...

This is the first time you have used this device or browser to sign a document.

We have sent you an email that contains an authentication link. Check your email inbox, open the email and follow the instructions.






This process is important, and helps ensure that unauthorised people cannot process your documents.

It might take a couple of minutes for the email to come through. [Having problems?](#)

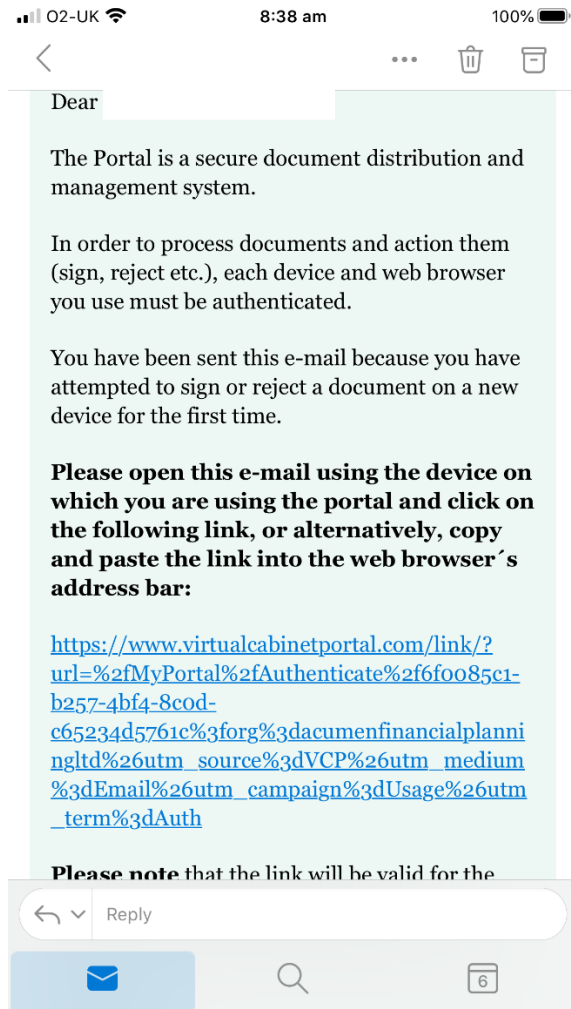
**Ok, got it!**

Name \_\_\_\_\_ (Client 1)  
Signed \_\_\_\_\_ Date \_\_\_\_\_  
Name \_\_\_\_\_ (Client 2)  
Signed \_\_\_\_\_ Date \_\_\_\_\_

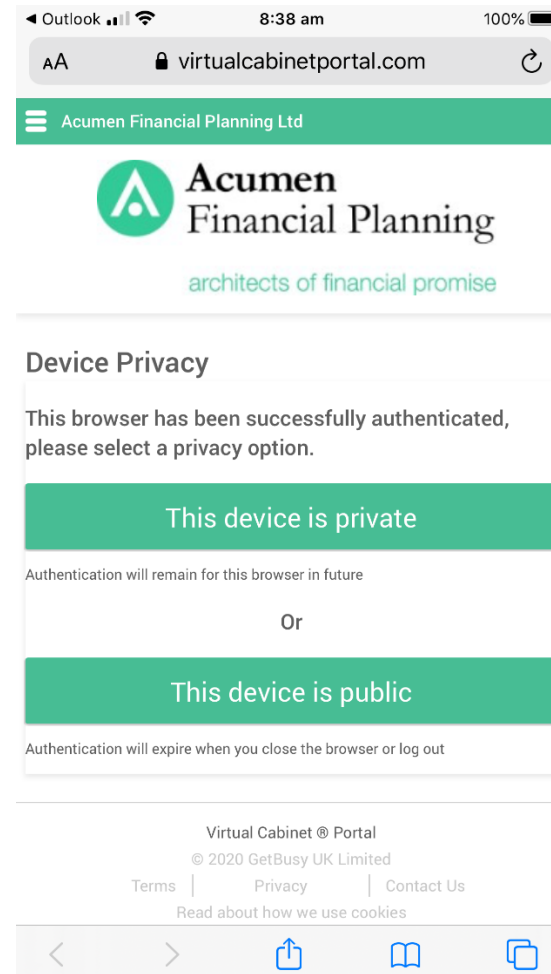
Business Process of Monitoring of Client Financial Information

- 7) You will now have been sent another email. Click the link



- 8) This page will now appear, select which option is applicable (normally private)



- 9) You will then see this page. There is no need to type a message, just click on 'Sign'

Outlook 8:38 am 99%

AA virtualcabinetportal.com

### Signing Statement

By electronically signing this document, I acknowledge this is the equivalent of providing a written signature on a hardcopy document.

### Message

Type an optional message that will also be added to the signed document...

500

### Your Signature

Your signature will contain:

- ✓ information that identifies you
- ✓ any message you have entered above
- ✓ your current I.P. address (51.52.158.238)

Sign Cancel

- 10) This page will then appear giving you the option to download the document. We suggest you select 'Download a copy'

Outlook 8:38 am 99%

AA virtualcabinetportal.com

### Thanks!

You have successfully signed the document Client Service Agreement - 2020.

We've notified Andrea

### What next?

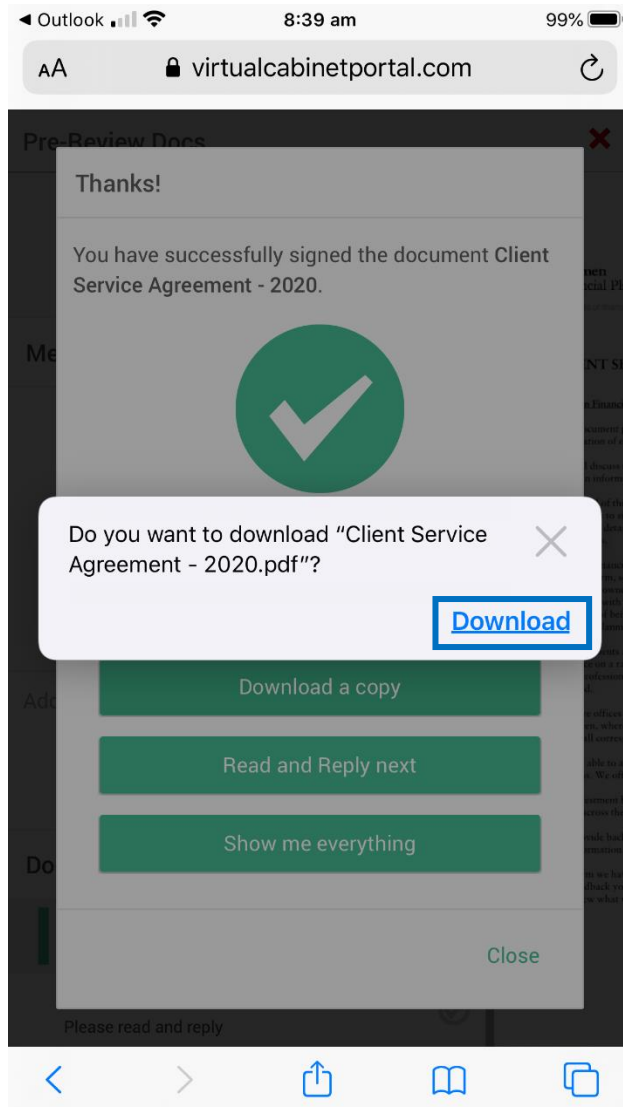
Download a copy

Read and Reply next

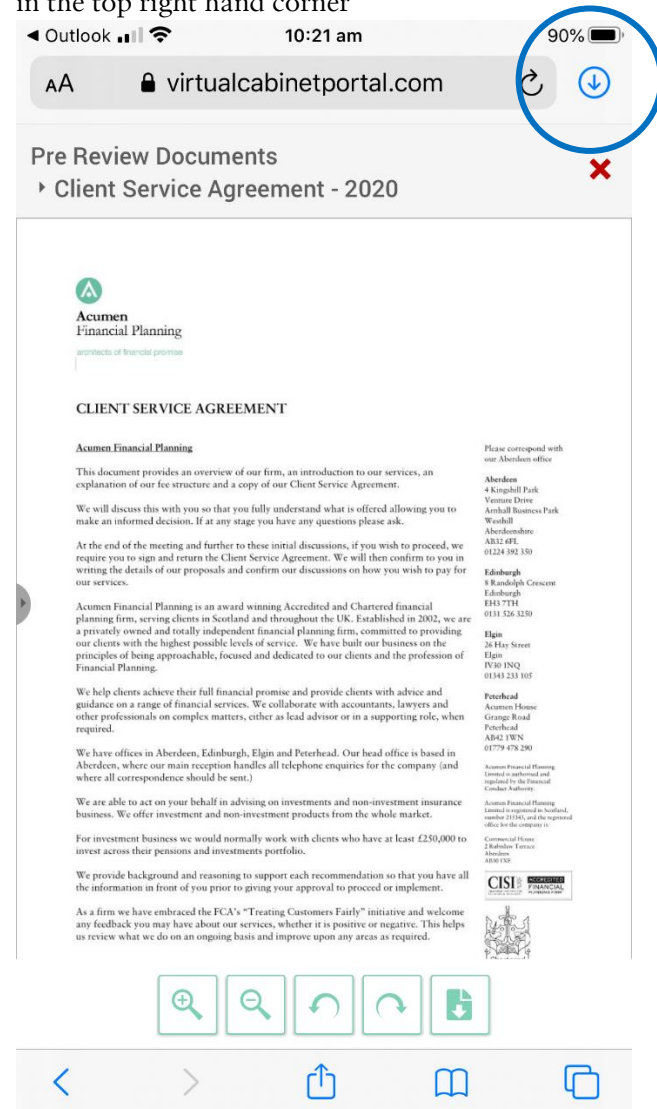
Show me everything

Close

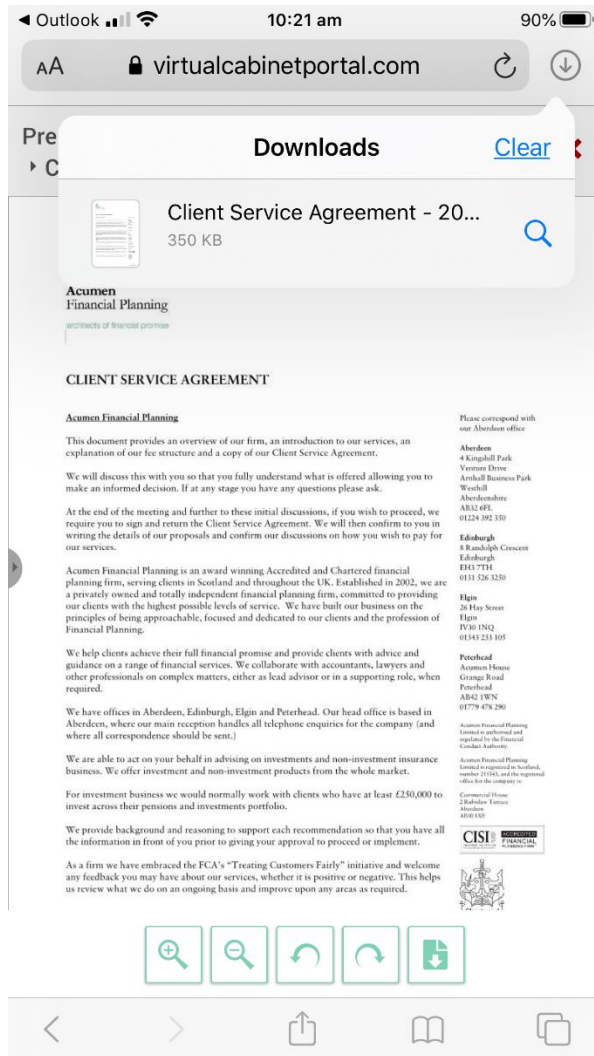
11) This message then appears, select download



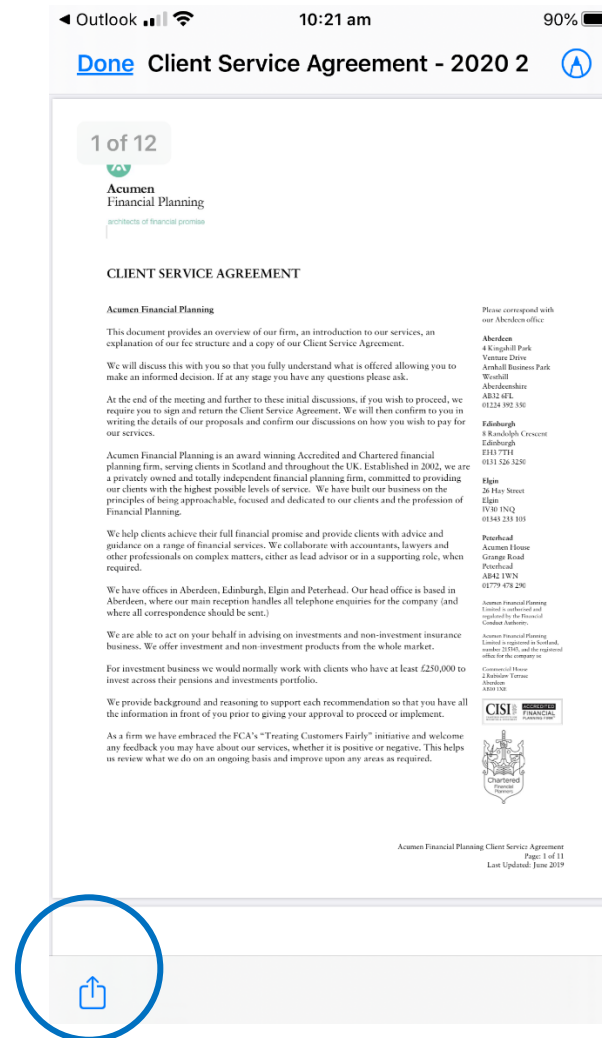
12) The document will then open. Select the downward blue arrow in the top right hand corner



13) This box will now appear. Click on the document

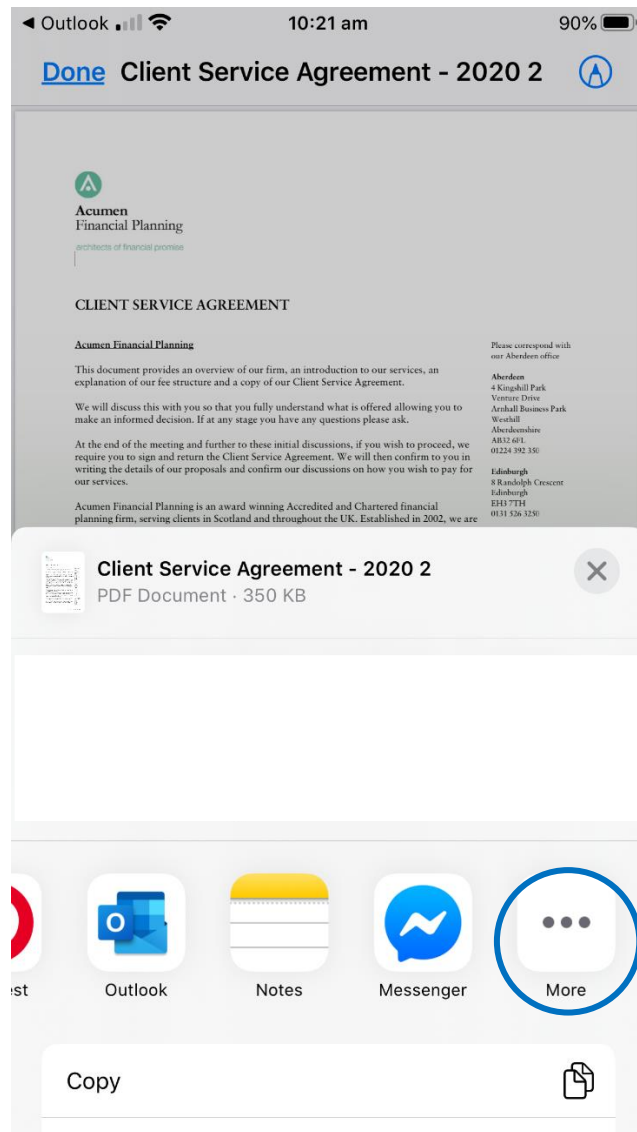


14) The document will open. Click on the icon in the bottom left corner

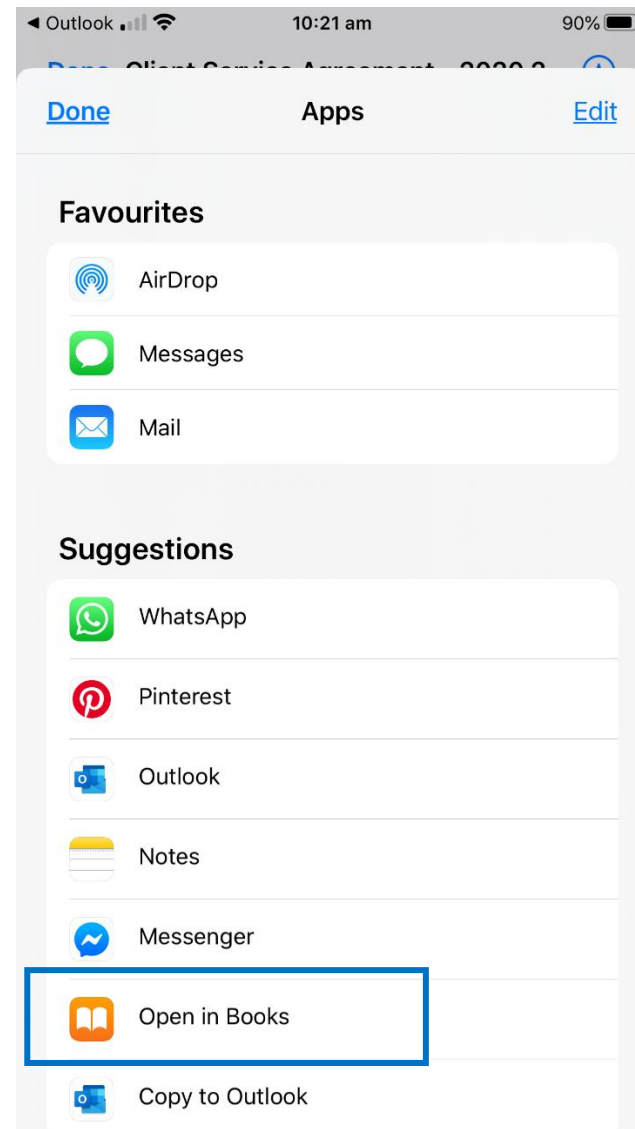




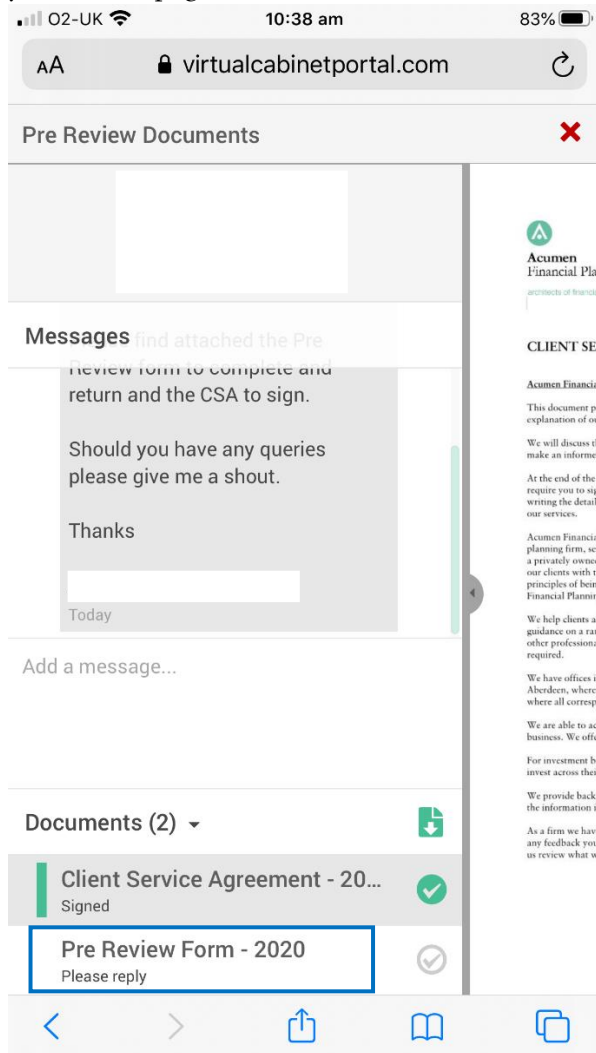
15) This screen will now appear, click on More



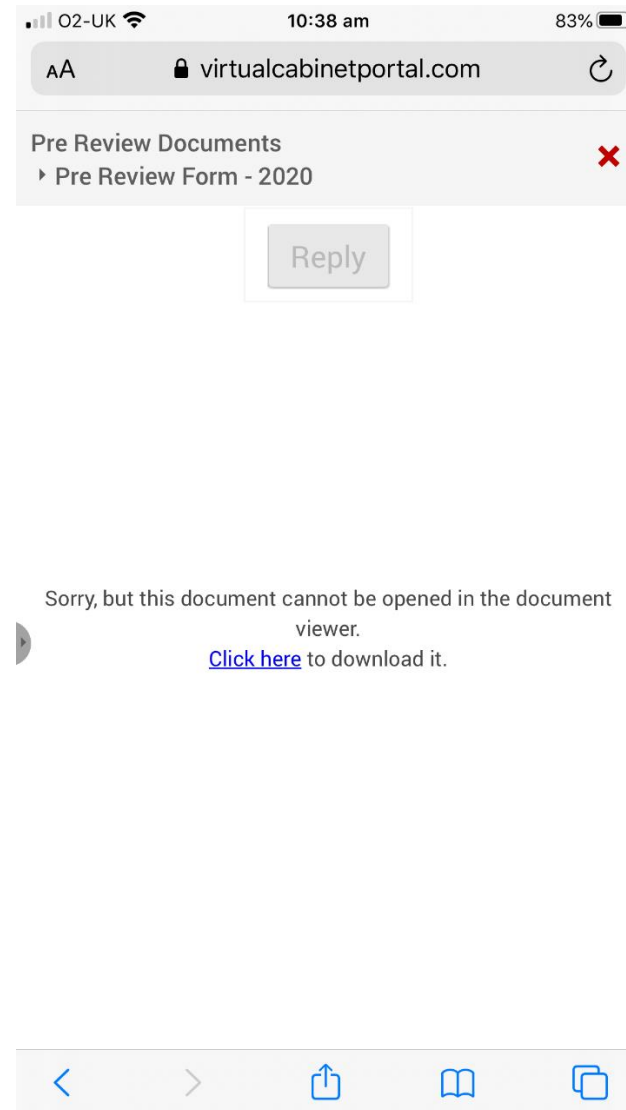
16) This screen will now appear. Select Open in iBooks



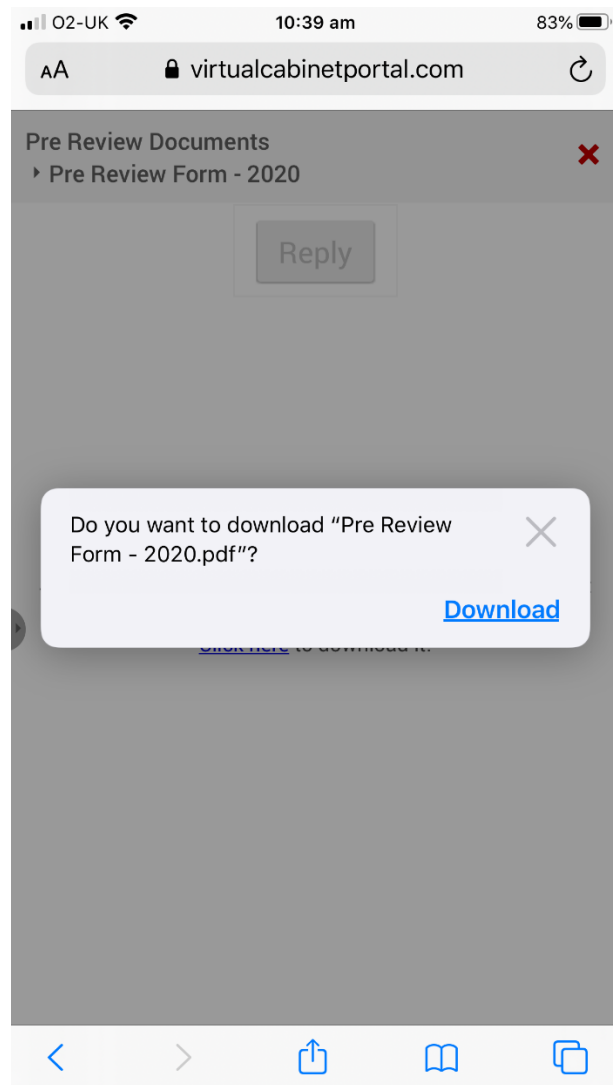
- 17) This will then save the document in iBooks for your future reference. Now go back to the portal page by clicking back to safari, clicking 'Done' and closing the relevant windows until you see this page



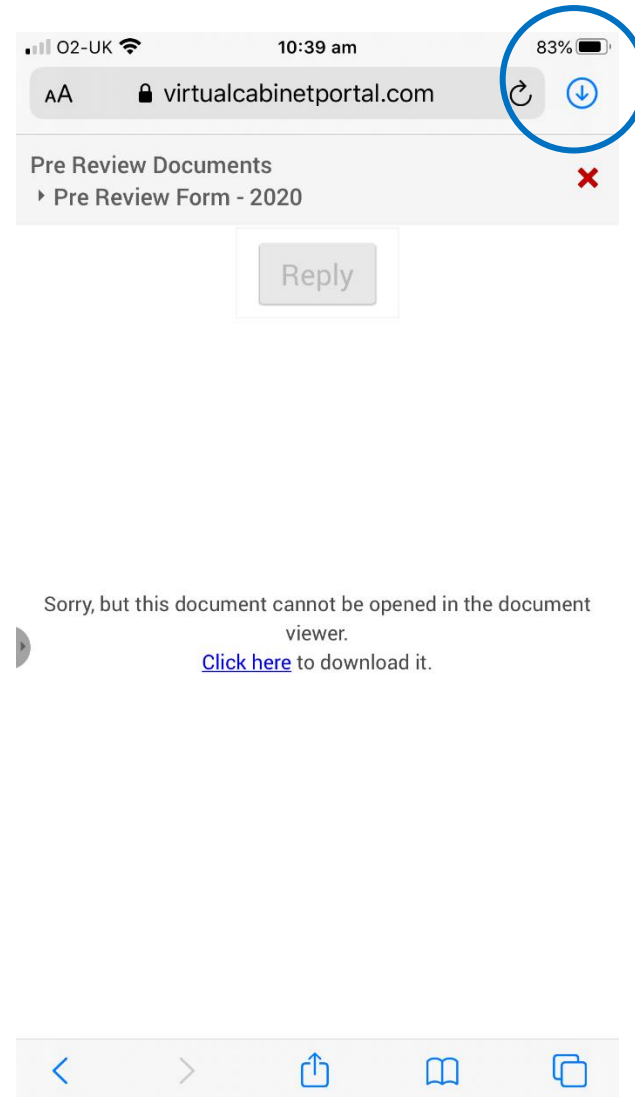
- 18) Click on Pre Review Form – 2020. Select 'Click here'



19) Select 'Download'

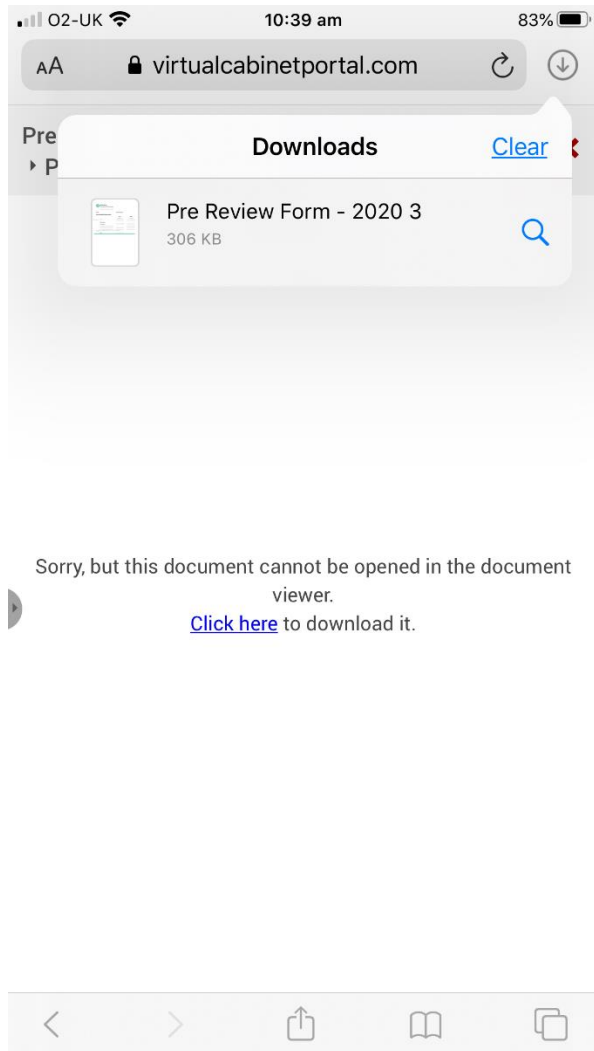


20) The document will then open. Select the downward blue arrow in the top right hand corner



Sorry, but this document cannot be opened in the document viewer.  
[Click here](#) to download it.

21) Click on the document




22) The document will now open. Click on the icon in the bottom left corner


The screenshot shows the 'Pre Review Form - 2020 3' document. The header includes the 'Done' button, the title 'Pre Review Form - 2020 3', and a share icon. The document content is from 'Financial Planning architects of financial promise'. It includes fields for 'Name:', 'Date Completed:', and 'Gross Annual Income 2020'. A table lists income sources: Client Name, Salary, Dividends, Rental Income, and State Pension. The 'Total' is calculated as '£0'. The footer shows the 'Acumen Financial Planning' logo and the title 'Annual Expenditure Analysis 2020'. A share icon in the bottom left corner is circled in blue.

Gross Annual Income 2020		2020	Timing
		e.g. £50,000	e.g. to age 60
Client Name	Salary	25000	
	Dividends	10000	
	Rental Income		
	State Pension		
If applicable, additional holdings to be calculated by AFP			
	Total	£0	

23) This screen will now appear, click on More

10:40 am 83%



[Done](#) Pre Review Form - 2020 3 





 Financial Planning  
architects of financial promise


Name: \_\_\_\_\_ Date Completed: \_\_\_\_\_

**Gross Annual Income 2020**

	2020 e.g £50,000	Timing e.g. to age 60
Client Name		
Salary	25000	
Dividends	10000	
Rental Income		
State Pension		
<i>If applicable, additional holdings to be calculated by AFP</i>		
Total	Eo	

 **Pre Review Form - 2020 3**  
PDF Document · 329 KB 

 Outlook  Notes  Messenger  More




Copy 

24) This screen will now appear. Select Open in iBooks








10:21 am 90%

[Done](#) Apps [Edit](#)

**Favourites**

-  AirDrop
-  Messages
-  Mail

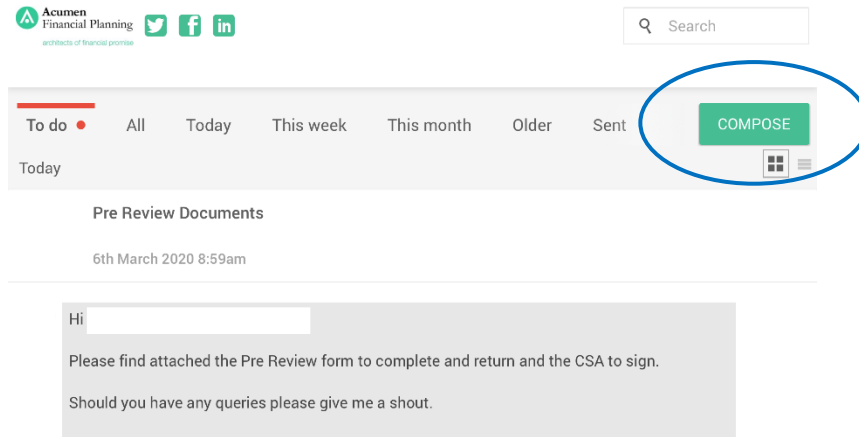
**Suggestions**

-  WhatsApp
-  Pinterest
-  Outlook
-  Notes
-  Messenger
-  Open in Books
-  Copy to Outlook

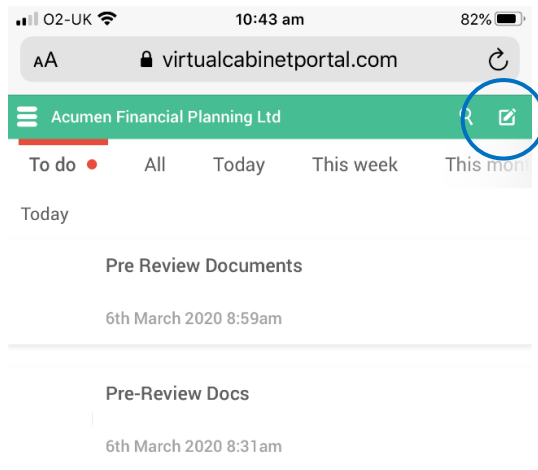
[illegible]

A screenshot of an iPhone home screen with a grid of app icons. The status bar at the top shows 'O2-UK', signal strength, time '11:12 am', and battery '78%'. The app grid includes: Calendar (Friday 6), Photos, Weather, Books, Clock, Notes, iTunes Store, Settings (with a red notification badge '1'), Google Maps, Calculator, Camera, FaceTime, Phone, ANZ, Safari (circled in red), Sonos, Spotify, Lightroom, M&amp;S (EST. 1984), Instagram, STV Player, RingGo, RBS, and a dock at the bottom with Messages, WhatsApp, Outlook (with a red notification badge '1'), and Telegram. The background is a blue and purple abstract pattern.

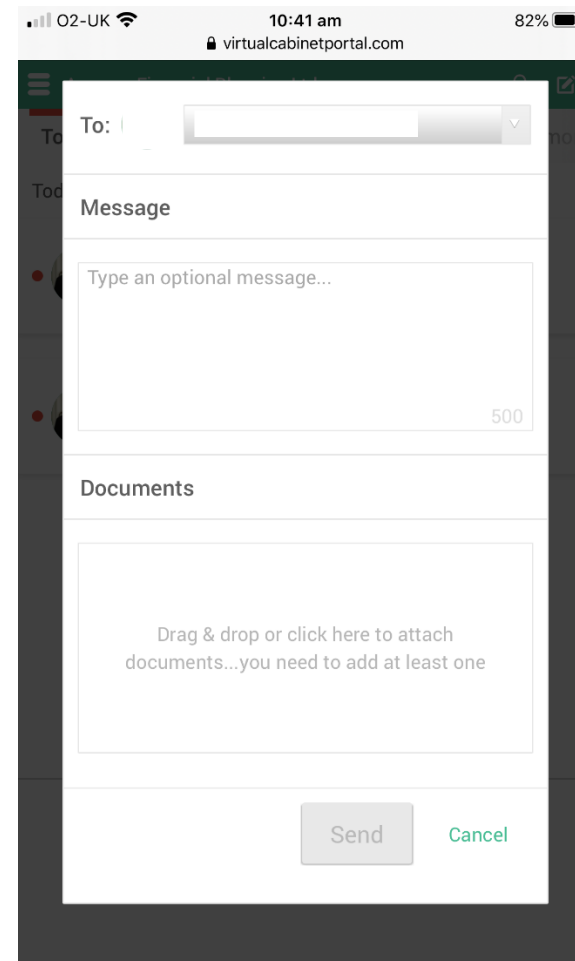
- 27) Once back in the Portal, turn your phone landscape and you will see a 'Compose' button



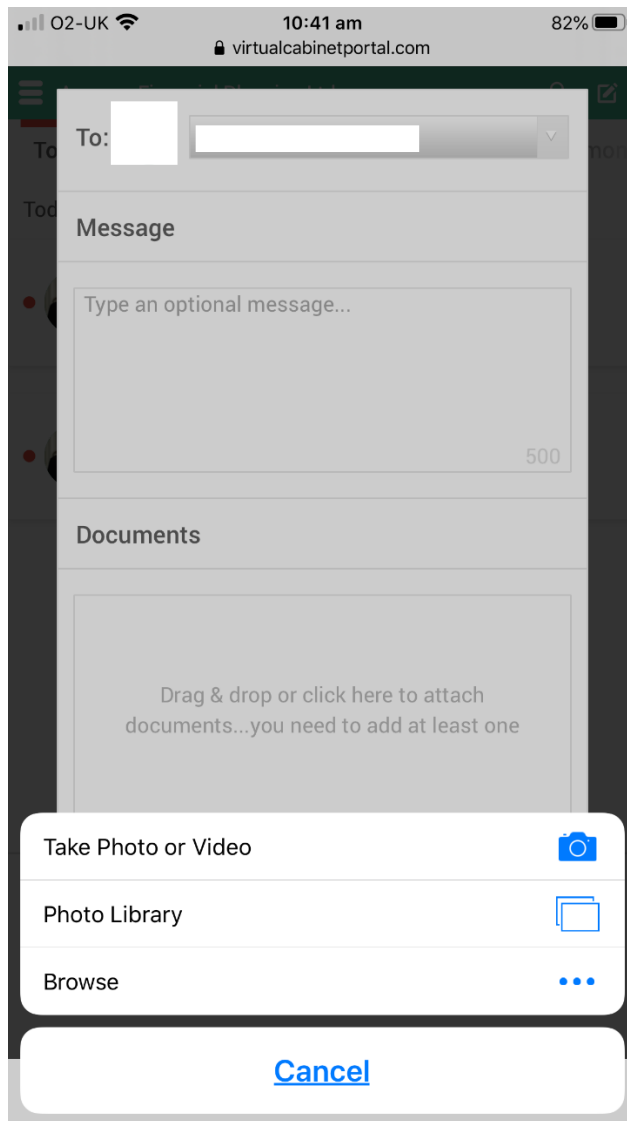
Alternatively keep your phone in portrait mode and click on the icon in the top right hand corner



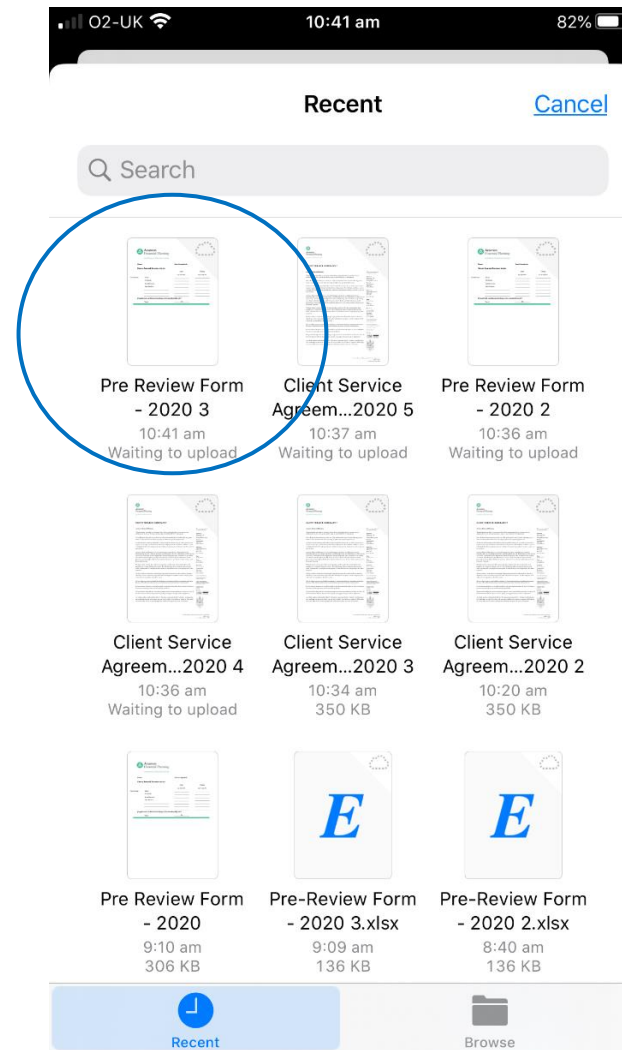
- 28) This window now appears. You can type a message in the message box if you wish then click on the document box



29) Click 'Browse'

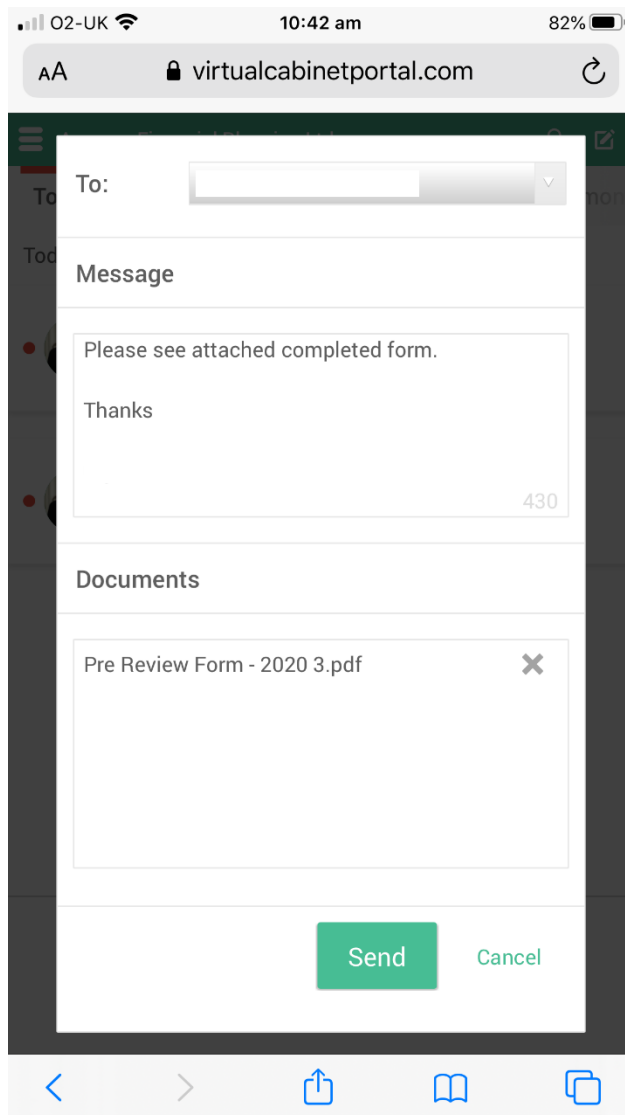


30) This will take you to where all your downloaded documents are saved. Select the Pre Review Form. (You can add multiple documents, just repeat steps 28, 29 and 30)





31) Hit 'Send'



32) A confirmation message will then appear. Select 'Close' and exit the portal.

