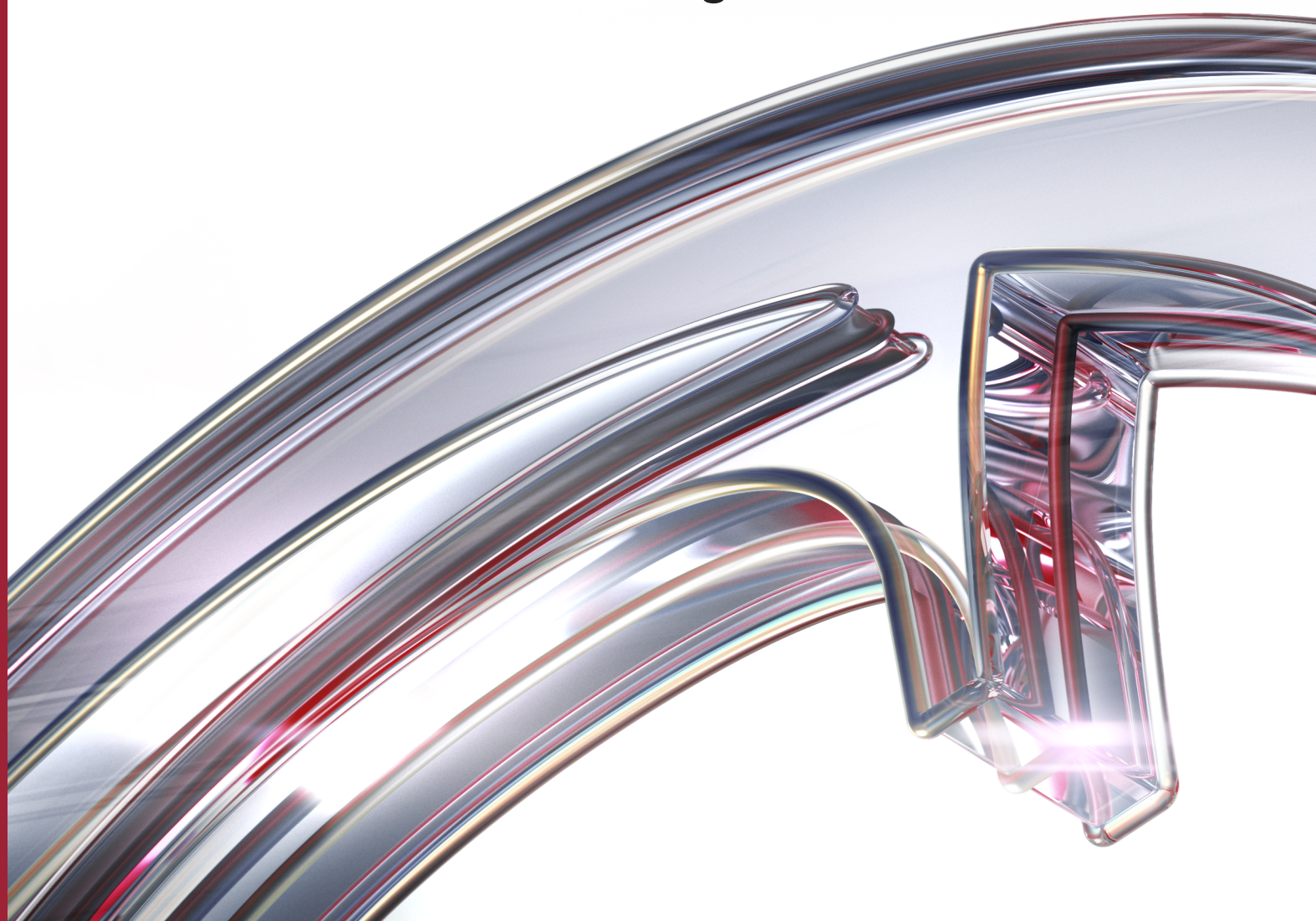


COURTIER

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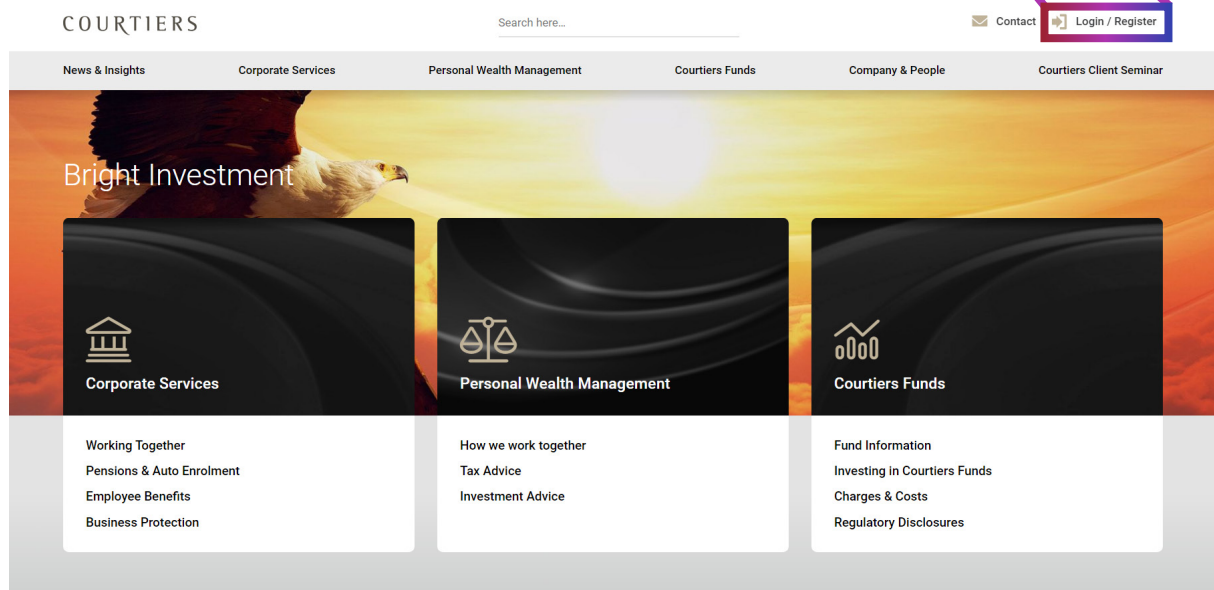
Personal Finance Portal

How to Register

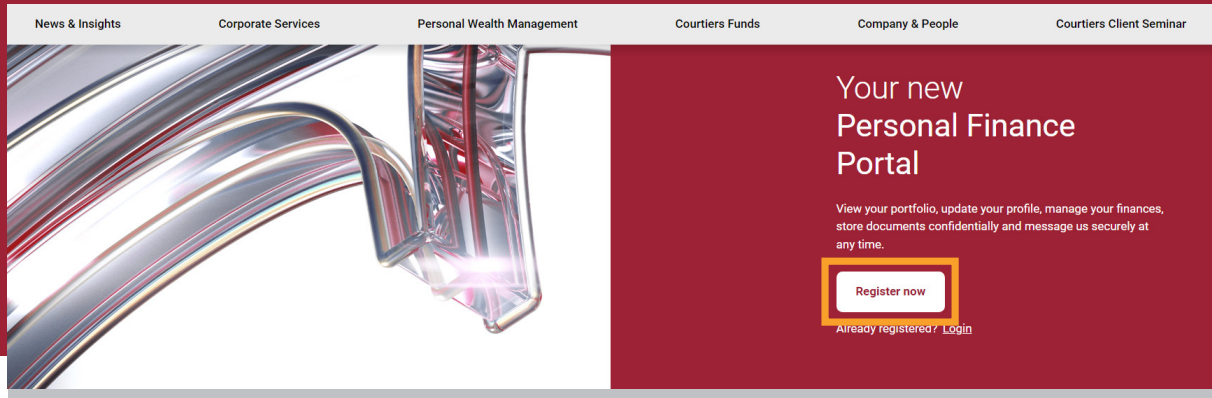


1. Visit **courtiers.co.uk**

2. Click **login/ register**



3. Hit the **Register now** button



4. Enter your **email address** (*confirming you're not a robot*) and hit **Start Registration**

A screenshot of a registration form titled "Registration" with a user icon. Below the title is an information box with an 'i' icon and the text: "You are only able to register with the email address that you have provided to your Adviser. After registration this will be the email address you log in with." The form is divided into two main sections. The left section contains an "Email Address" input field with a red "x" icon on the right. Below the input field is a checkbox labeled "I'm not a robot" and a reCAPTCHA logo with the text "reCAPTCHA Privacy - Terms". At the bottom of this section is a red "Start Registration" button with a right-pointing arrow. The right section contains four steps, each with a red checkmark icon: "Step 1: Enter your email address that you have given to your adviser.", "Step 2: Tap the 'Start Registration' button and we'll send an activation link to your email address.", "Step 3: Tap the link in the email and follow the on-screen instructions.", and "Step 4: Congratulations! You are ready to log in to your Personal Finance Portal."

Your email address must be one you've given us previously.



5. Check your email

6. **Activate your account**

Personal Finance Portal - Registration

COURTIERS



Registration Successful

Dear Leo,

Thanks for registering for Personal Finance Portal. To complete your activation click on the button below.

[Activate Account »](#)

As a security measure the activation link provided expires after **46 hours**.

This is an automated notification sent from Personal Finance Portal.

Please do not reply to this email!



7. Verify your identity and hit **Register**

Identity Verification

Confirm Existing Security Information

Please verify your identity by confirming the following details which you have previously provided to your Financial Adviser.

Date Of Birth DD/MM/YYYY

Postcode

Password

Create a password that you will use to access this service. *Passwords must be a minimum of 8 characters and contain at least one capital letter and one number.*

Password

Confirm Password

Settings

Additional user settings.

Timezone

(+00:00) Europe/London

Terms and Conditions

You must accept the following policies to continue.

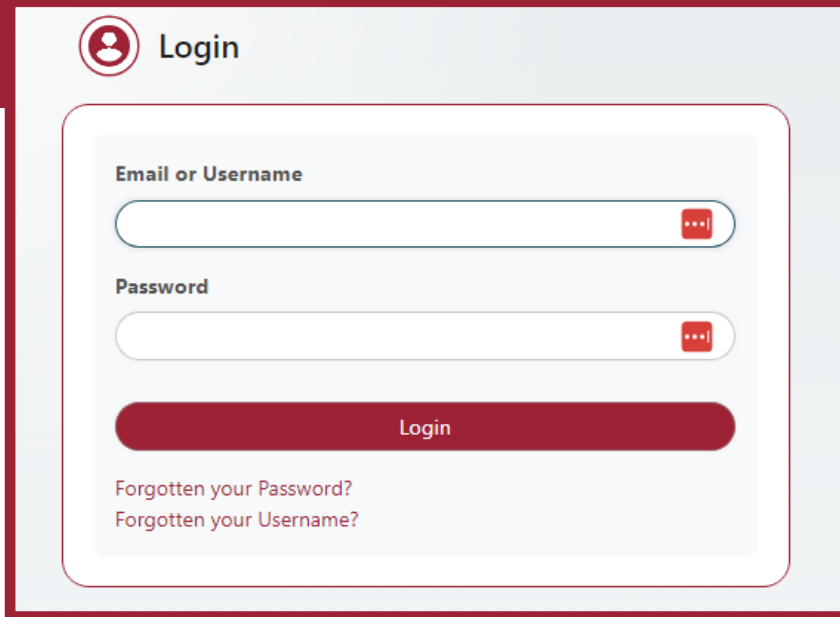
☐ I have read and accept the [Terms of Use](#)

☐ I have read and accept the [Cookies Policy](#)

Register



Congratulations! You can now login and explore the benefits of your new Personal Finance Portal

A screenshot of a login form titled "Login" with a user icon. The form contains two input fields: "Email or Username" and "Password", each with a red eye icon for toggling visibility. Below the fields is a red "Login" button. At the bottom, there are two links: "Forgotten your Password?" and "Forgotten your Username?".

Login

Email or Username

Password

Login

[Forgotten your Password?](#)

[Forgotten your Username?](#)



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Personal Finance Portal



Additional Security



Optional and free – add Two-Factor Authentication



What is Two-Factor Authentication?

Two-Factor authentication (2FA) is a security feature that requires you to Authenticate your login each time with additional steps. It means that even if a third party acquires your login password, they won't be able to access your portal.

Using Two-Factor Authentication

To use 2FA you'll need an authenticator app for your smartphone. Free apps are available from various providers including **Google Authenticator**, **DUO Authenticator** or **Microsoft Authenticator**. While there are many other authenticator apps available, these are popular and don't cost money.

When you first access your Personal Finance Portal, you'll be asked to set up 2FA. Choose "Get Started" or "Remind me in a week" and, depending on your choice, the portal will guide you to complete 2FA setup or periodically offer you the option in future.





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