

# True Potential Client Site

New Login Process



## Account Activation & New Login Process

We're changing the way you log into your account on the True Potential Client Site to make it easier and more secure than ever before.

Rather than asking you to remember a user ID which can be forgotten easily, you will now be able to use your **email address** to log into your account online.

Whilst this is easier to remember, it also means that if you forget your login details you can quickly reset them yourself through the site.

Included in this document are step by step instructions showing how you can access your site and update your profile to use your email address. It also shows **how to reset your password or passphrase** if these details are forgotten.

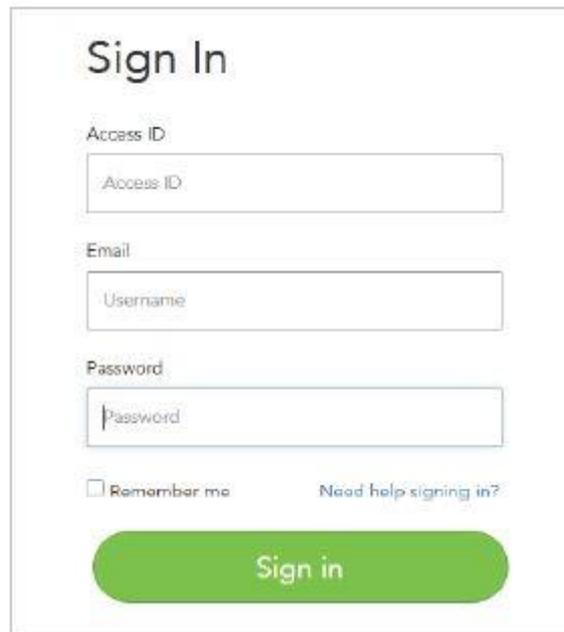
If you have any queries or concerns about this process please contact your financial adviser for more information or assistance.

## Activating your New Username

You will first need to visit the client site, which can be done by following the 'Already a Client Login' link on our company website:

[www.privatewealth.co.uk](http://www.privatewealth.co.uk)

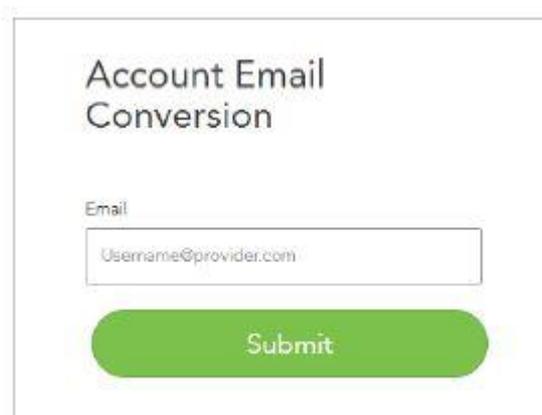
On the login page you will be asked to enter the access ID supplied by your financial adviser, your user ID and password. You will notice you are not asked for a passphrase at this stage.



The image shows a 'Sign In' form with the following fields and elements:

- Access ID:** A text input field with the placeholder text 'Access ID'.
- Email:** A text input field with the placeholder text 'Username'.
- Password:** A text input field with the placeholder text 'Password'.
- Remember me
- [Need help signing in?](#)
- Sign in** button (green rounded rectangle)

After clicking Login, you will then be prompted to enter your email address which will be used for all subsequent logins. **This email address must be unique.**



The image shows an 'Account Email Conversion' form with the following fields and elements:

- Email:** A text input field with the placeholder text 'Username@provider.com'.
- Submit** button (green rounded rectangle)

You will receive an email to your specified email address, if this does not arrive within a couple of minutes you should check your spam/junk folder.

The email will include a button which you can click to be taken back to the client site to activate your new username.



## ACTIVATE YOUR ACCOUNT

Dear Bernard,

Thank you for registering.

Before you can add funds to your investment, you need to activate your account and confirm your email address by clicking the button below.

**ACTIVATE NOW**

If you can't see the button, copy and paste this address into your web browser:

<https://clientsite.tpinside.com/SecurityAction?sc=E3BA4078&aid=982>

You can also activate via your mobile device by using the following code:  
E3BA4078

Your capital is at risk. Investments can fluctuate in value and you may get back less than you invest. Past performance is not a guide to future performance. Tax rules can change at any time.



Once you have clicked on the link in the email, you will be redirected back to the site where you will be asked to create a new password. Please note that the password must be at least 8 characters long.

You will be also be prompted to create a 12 character passphrase which is required for all subsequent logins. The passphrase must have no fewer than 6 unique characters.

## Complete Conversion

Please Note: Your Password must contain 8 characters or more and no spaces.

Your Passphrase must be at least 12 characters long with 6 unique characters.

Password

Confirm Password

Passphrase

Confirm Passphrase

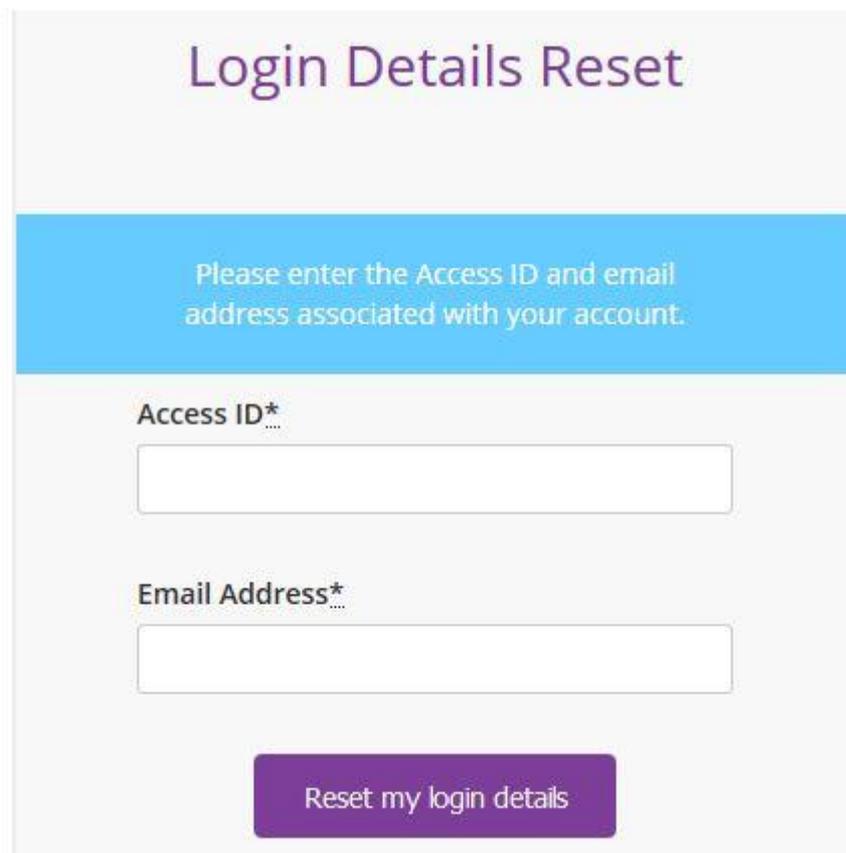
**Submit**

*If you are having trouble converting your account or logging in, please continue in this document for troubleshooting tips.*

## Troubleshooting Tips

### *Q. How do I reset my password for the client site?*

If you've forgotten your password for the client site you can click the 'Forgotten Password?' button at the bottom right of the Login page, enter your access ID and email address to be sent a link for resetting your password.



The screenshot shows a web form titled "Login Details Reset". At the top, there is a blue banner with the text "Please enter the Access ID and email address associated with your account." Below this banner, there are two input fields: "Access ID\*" and "Email Address\*", each with a corresponding text box. At the bottom of the form, there is a purple button labeled "Reset my login details".

When you receive the email, click the link to be taken back to the client site where you will be prompted to create a new password and a new passphrase at the same time.

***Q. Why have I received a message saying my email address is already in use?***

This message will appear if the email address you have entered has already been used by another client. Each account on the client site must have a unique email address to be used as their username. If you and an associated client only have one email address then you can login using that email address and click the 'Joint View' button at the top of your screen to view both portfolios. (If you do not have the Joint View button please contact your Financial Adviser to get this set up).

**Email Address already in use** ×

The email address you have entered is already in use. Please enter a different one or contact your financial adviser to resolve this matter

***Q. Why haven't I received the activation email?***

If you have not received the activation email and it is not in your spam/junk folder, please go back to the client site login page and either resend the email or change the email address used to resend it.

Resend Email

Change Email