

# True Potential Client Site

Platform Login Process



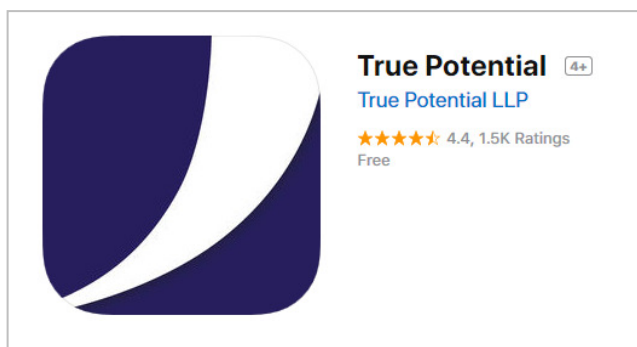
## Account Activation & New Login Process

To activate your client site account, you will receive an email from your financial adviser which includes a link. Clicking on the link will take you to the activation site. Once on the activation site, you will simply be asked to enter your DOB which, along with a unique activation key, validates your client account and allows you to create your own login details.

The client site is a convenient way to securely view and track your investments 24/7. It also offers a number of unique features which are explained in detail on the client site guide which is available from your advisor.

Included in this document are step by step instructions showing how you can validate your account and setup your login details. There are also some troubleshooting tips to assist with any login problems after activating your account.

The client site is also available via the app which can be downloaded for use on your smart phone. Please search for True Potential on either your **iPhone or Android device** and ensure you download the app which indicates the icon as below:



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

## Activating your Client Site

The first step in activating your client site account will involve receiving an email which will be sent by your financial adviser. You must therefore have a valid email address setup and accessible.

Your adviser will send an email from their system. It should arrive almost immediately but if this is not the case, please check your junk/spam folder in case the email has been blocked by your internet service provider.

The email, which includes a link for you to click on to activate your account is no longer valid for only 24hrs so can be attended to at any time. You can also request your adviser to send the email again as there is no limit on the amount of times the activation email can be sent.

## Your Investments, On Demand

Dear Tom,

As a client of Wizard Wealth Management, you have been given unlimited, 24/7 access to your investments online and by app.

To access this online service, all you need to do is activate your account using the link below and then follow the simple the instructions. During this process, we will ask you to create a secure password and passphrase for your account.

Please click the link below or copy and paste into your browser:

<https://clientsite.truepotential.site/activate/0F798ABF>

Your Access ID is: 6129

You can also stay on top of your investment at any time or through our apps for iOS and Android devices.

Once you have clicked on the link in the email, you will be taken to the Account Activation page which will be populated with your unique activation key. **DO NOT CHANGE THIS.**

You now simply need to enter your DOB to verify your account activation.

**Account Activation**

**Verify your details**

In order to log in to your account, you need to activate it. Please enter your date of birth, your activation code has been pre-populated.

Your account will be locked if you enter these details incorrectly three times. Should this happen, please contact your financial adviser for a new activation code.

**Activation code**

48760E81

**Date of birth**

DD/MM/YYYY

**Save & Continue**

Following the account activation, you will then be prompted to create your login details which will be used for all subsequent logins.

You will be asked to enter an email address. This can be different to the email address which you used to receive the activation email, but **MUST BE UNIQUE** to your account (ie. It cannot be used by a partner or family member who is also a client on the platform)

**Create Account**

✓ Verification Successful. Please enter your details below to complete activation.

For future log ins, your Access ID is: 6505

**Email Address**

Next, you will need to create a **secure password**. The password must meet the following criteria:

- Not contain a space
- Be at least 8 characters long and can include special characters. I.e. It does not only have to be letters and numbers (#, @, \* etc can be used)
- Be different to your passphrase

Next you will need to create a **secure passphrase**. The passphrase must meet the following criteria:

- Not contain a space
- Be at least 8 characters
- Can only contain letters and numbers. **NO special characters may be used** ((#, @, \* etc cannot be used)
- Must have at least 6 unique characters (ie. Numbers or letters cannot be frequently repeated)
- Be different to your password

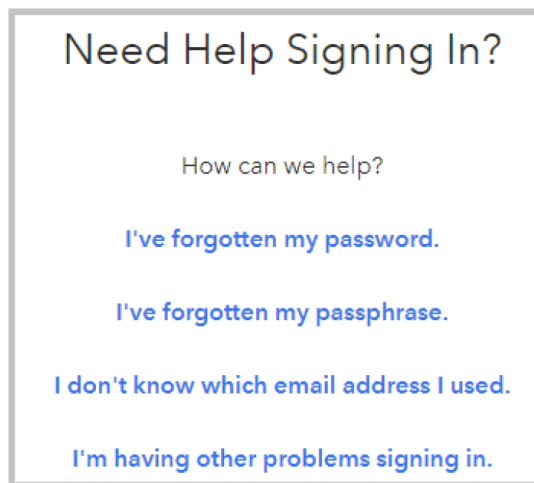
Once done, the email address which you entered will now serve as the username to the site. Your access ID remains as initially provided to you.

*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 'Need help?' button just above your login button and then chose the option you require assistance with




Should you need help with your password and passphrase, you will receive an email to your registered email address with a link. Clicking on this link will direct you to the client site to create a new password and passphrase.

If you don't know your email address or have any other issues logging in, please contact your financial adviser for assistance.

### *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 your partner or family member 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).

 Your Email Address is already assigned to another client, please enter a different one or contact your financial adviser. ×

***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 ask your financial adviser to resend it to you. There is no limit to the amount of times the email can be sent and the link will not expire.

***Q. I've locked my activation key?***

If you enter your DOB incorrectly 3 times, your activation key will be locked. Please contact your financial adviser to get a new key generated and issued to you via email.