

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'

Acumen Financial Planning architects of financial promise

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 ✓

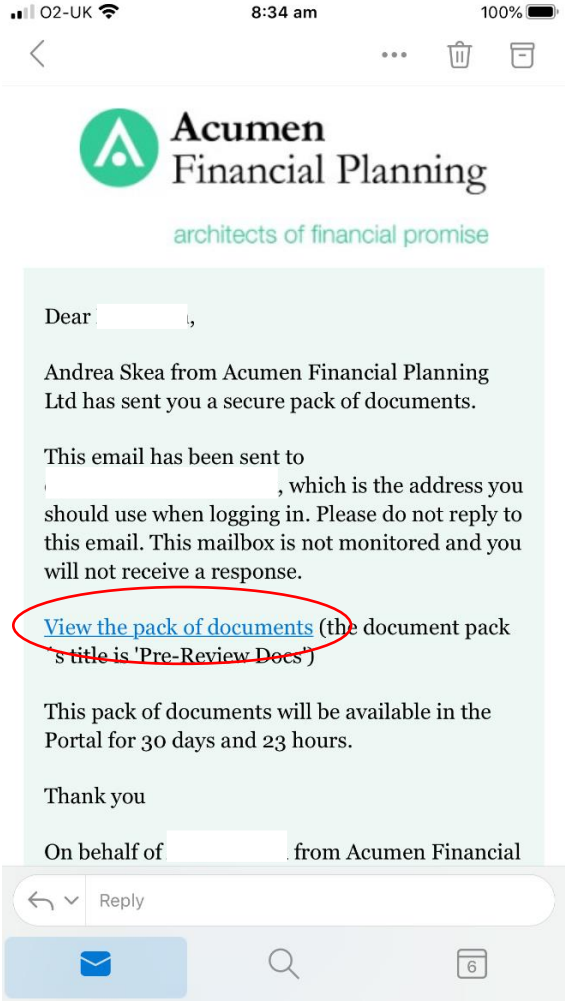
Password
Your new password

Confirm your new password

Next

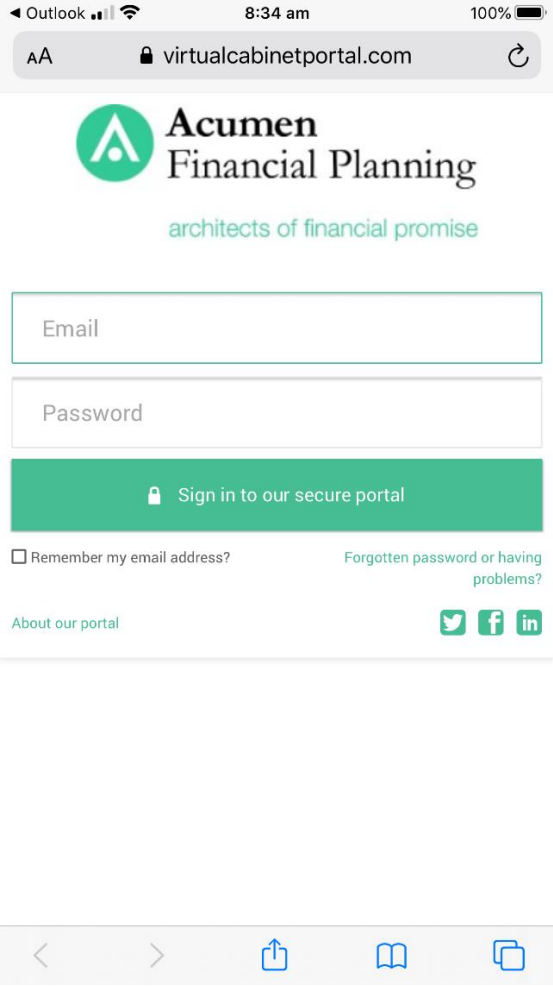
[About our portal](#)

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

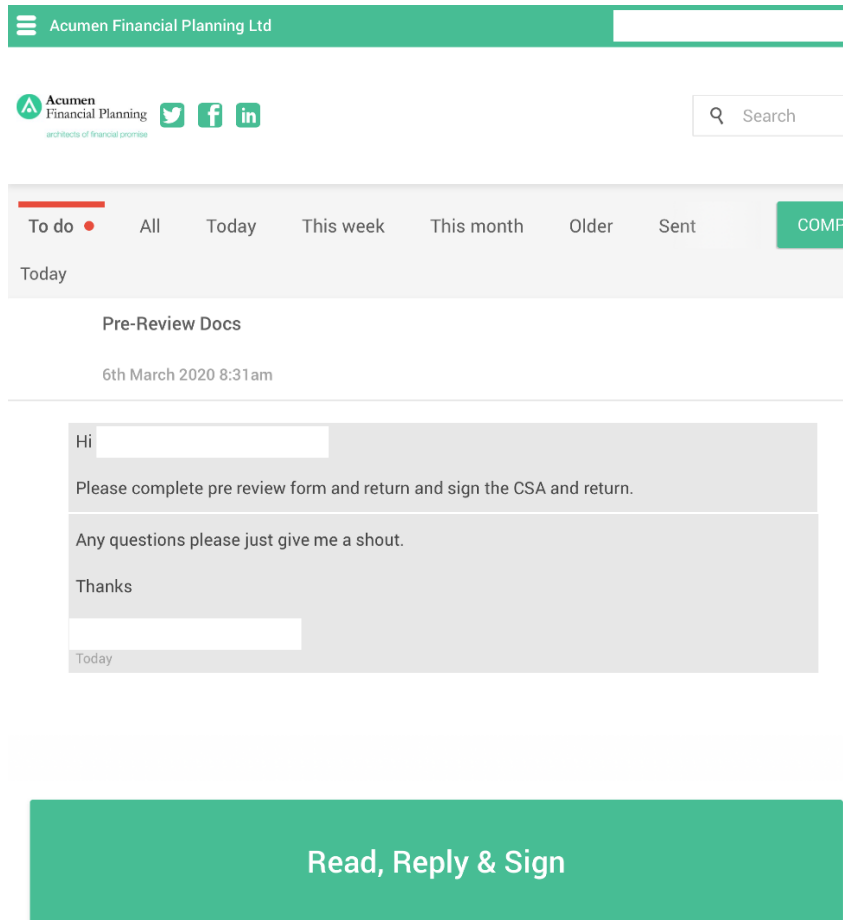


Click on 'View the pack of documents'

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

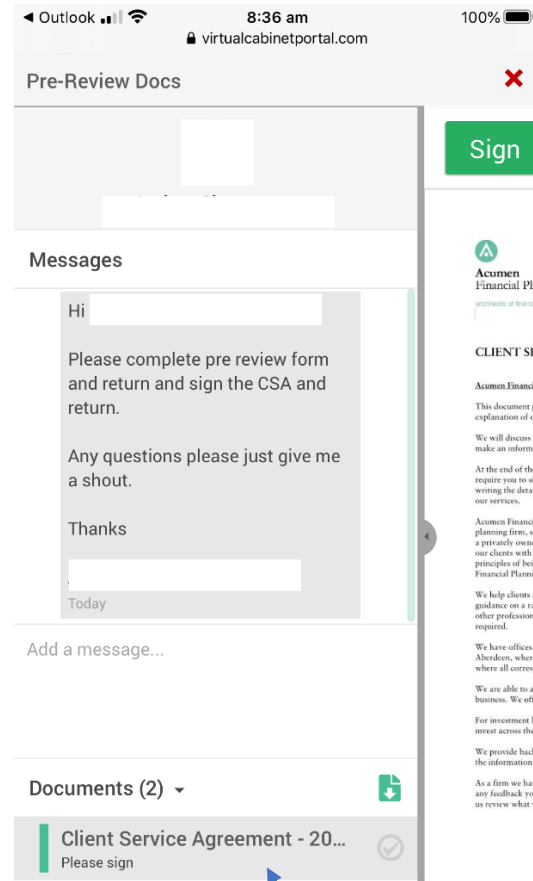


3) Then if on an iphone or tablet it's best to turn your phone landscape. You will see this page:



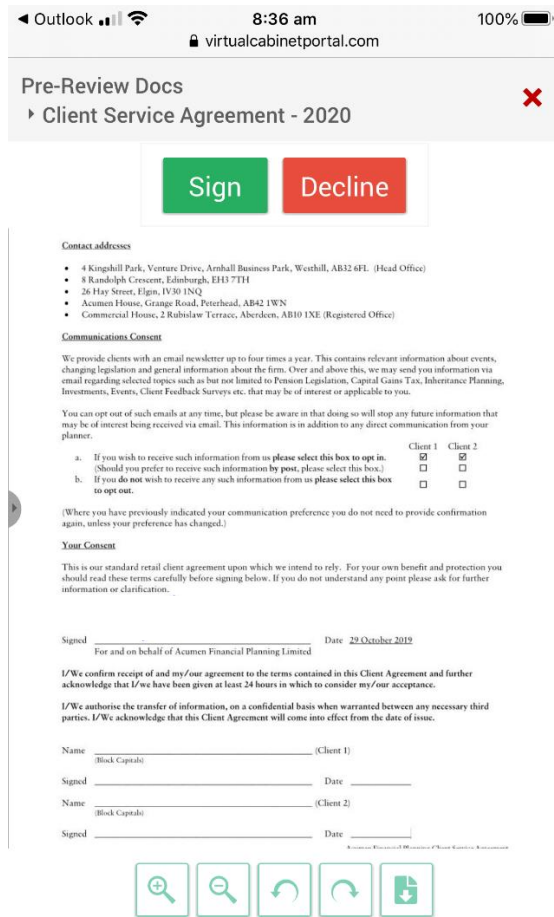
Scroll the bottom of the page and click on Read, Reply & Sign

4) This then takes you to this page

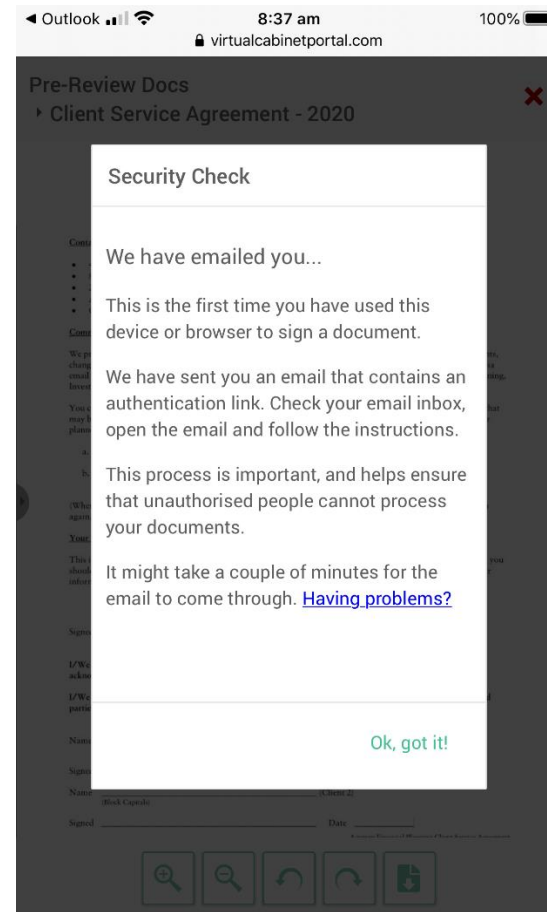


Click on the document name

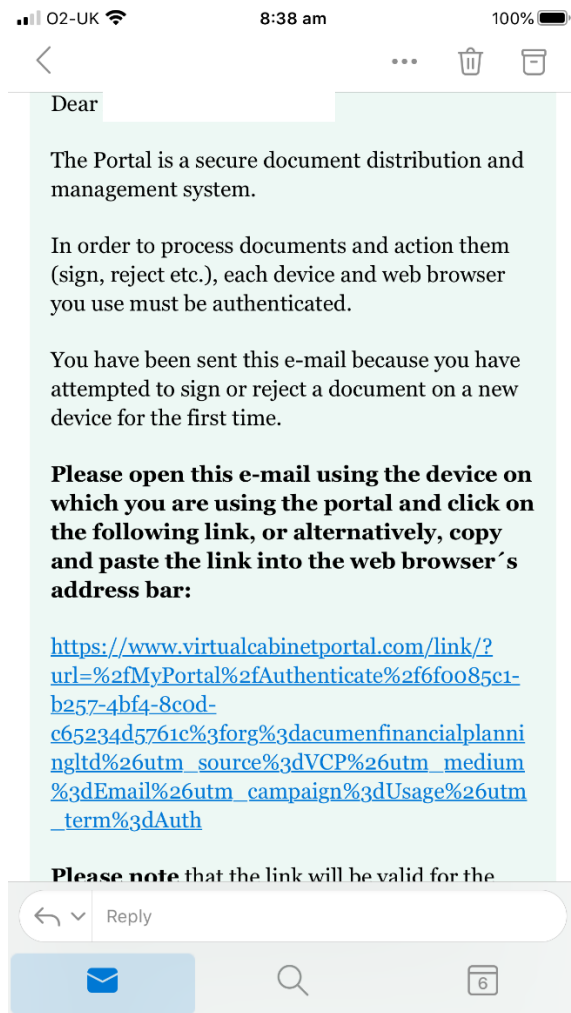
- 5) This opens the document, please read it and sign it by clicking on the 'Sign' button



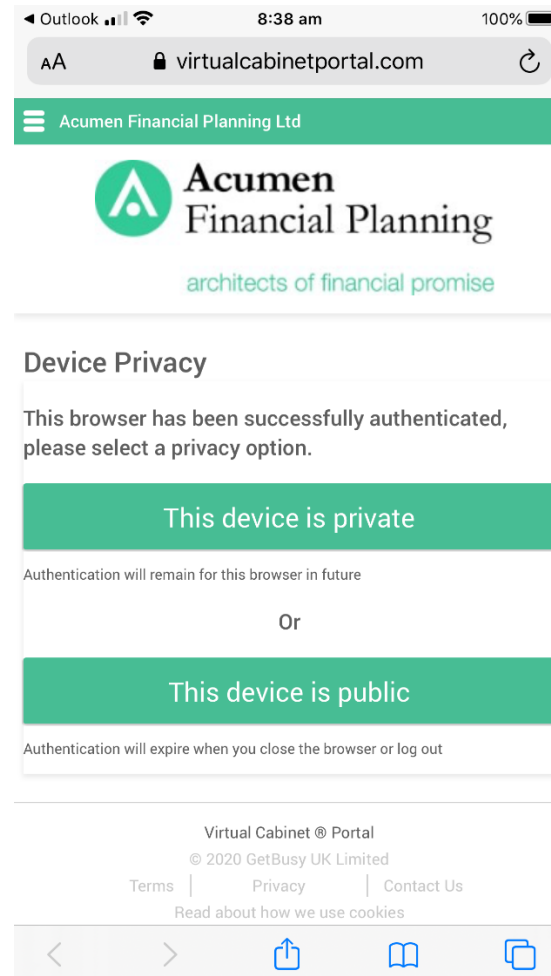
- 6) If using you're the portal on your iphone or tablet you may be asked to do a security check. This message will appear. Click on 'OK, got it!'



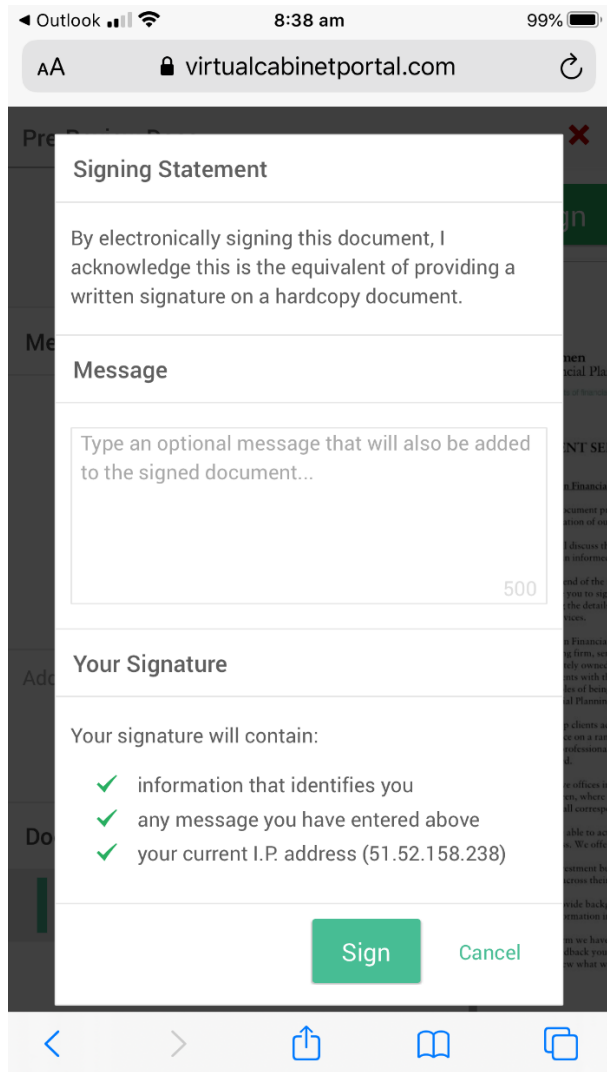
7) You will now have been sent another email. Click the link



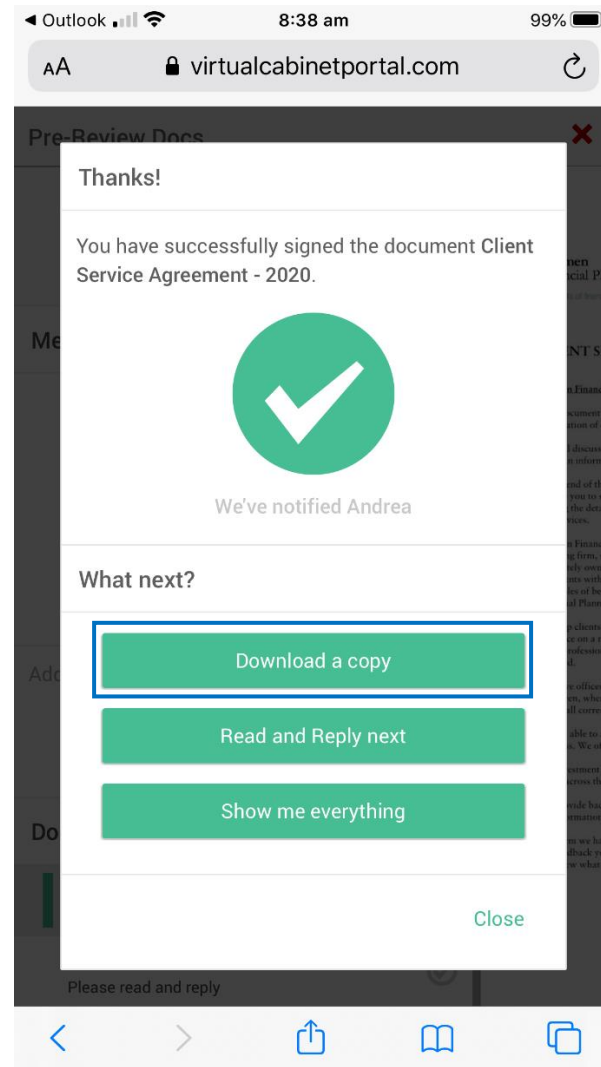
8) This page will now appear, select which option is applicable (normally private)



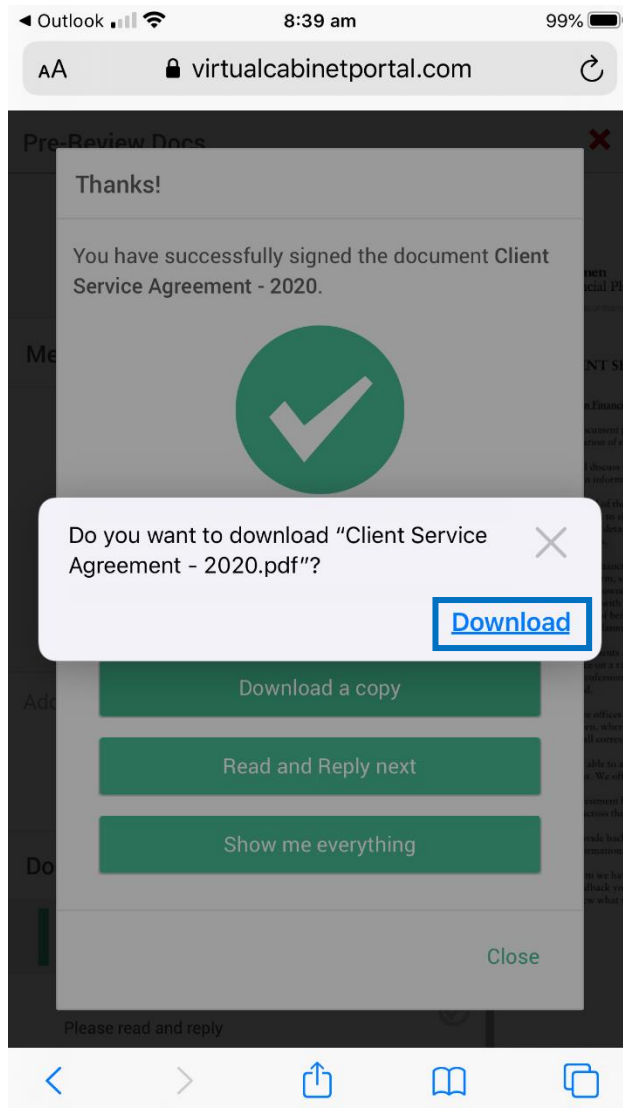
9) You will then see this page. There is no need to type a message, just click on 'Sign'



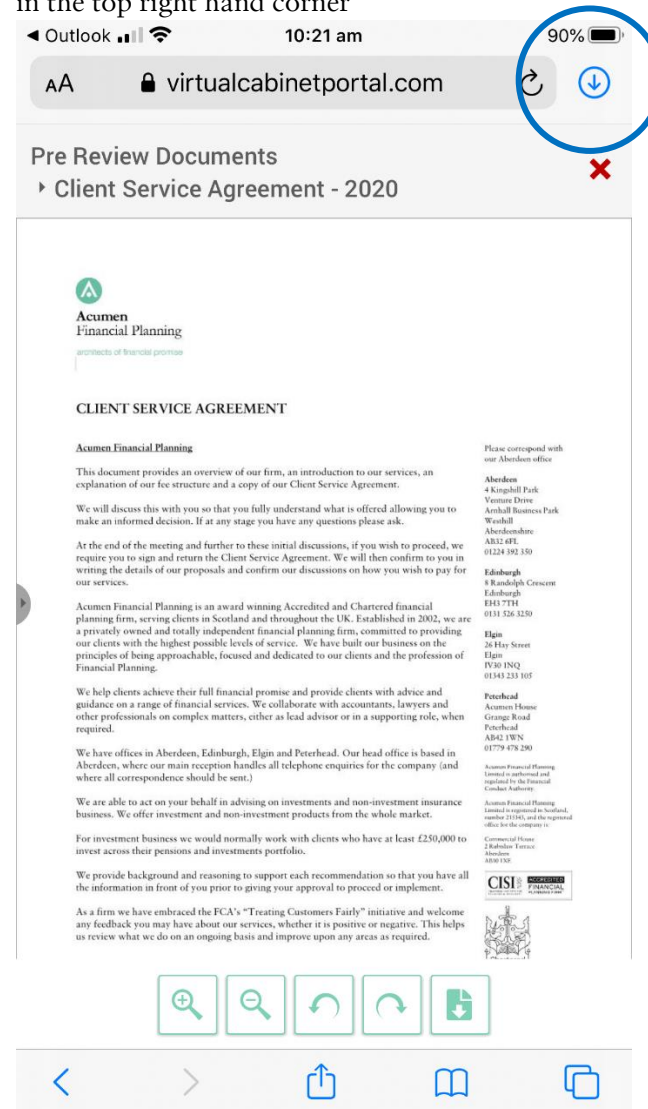
10) This page will then appear giving you the option to download the document. We suggest you select 'Download a copy'



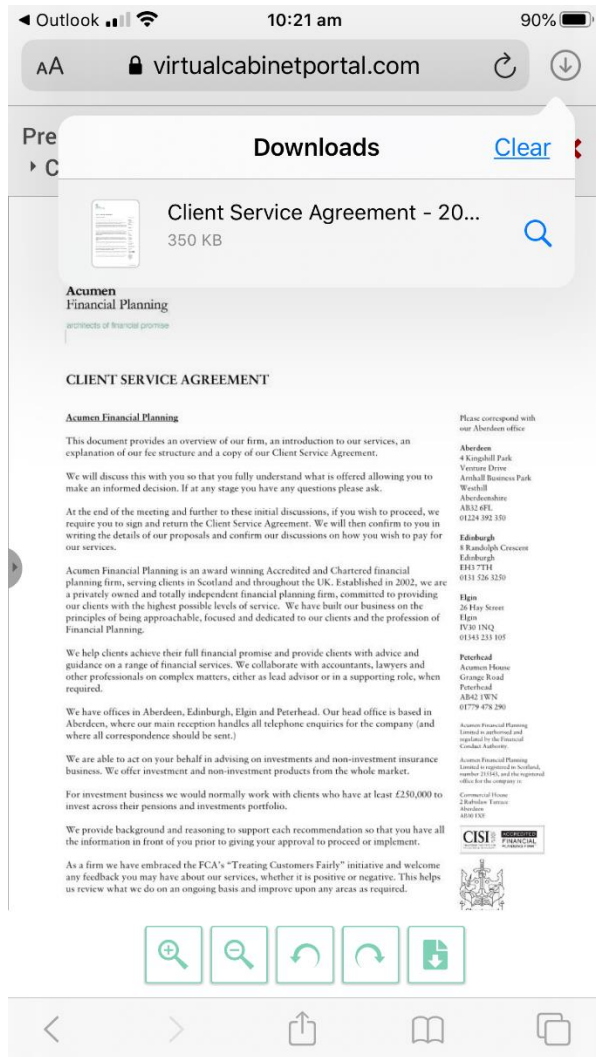
11) This message then appears, select download



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



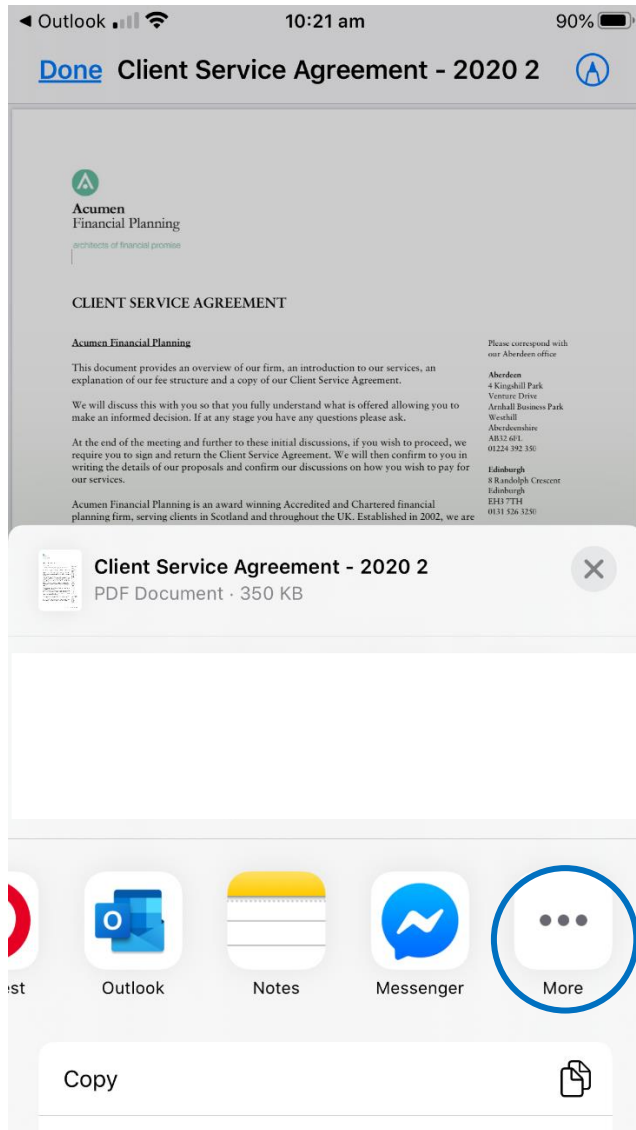
13) This box will now appear. Click on the document



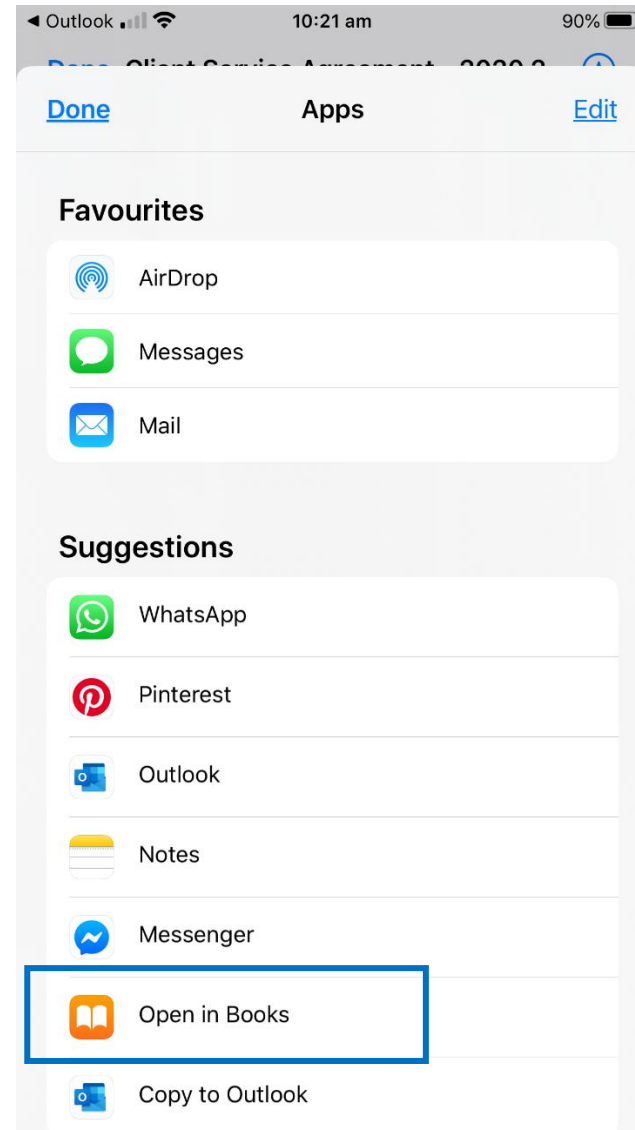
14) The document will open. Click on the icon in the bottom left corner



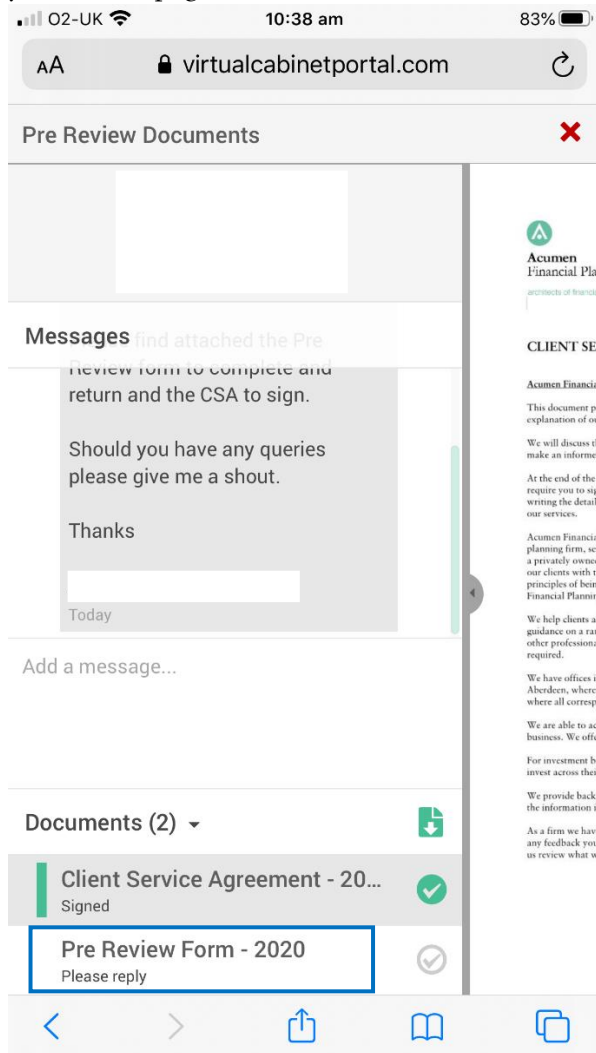
15) This screen will now appear, click on More



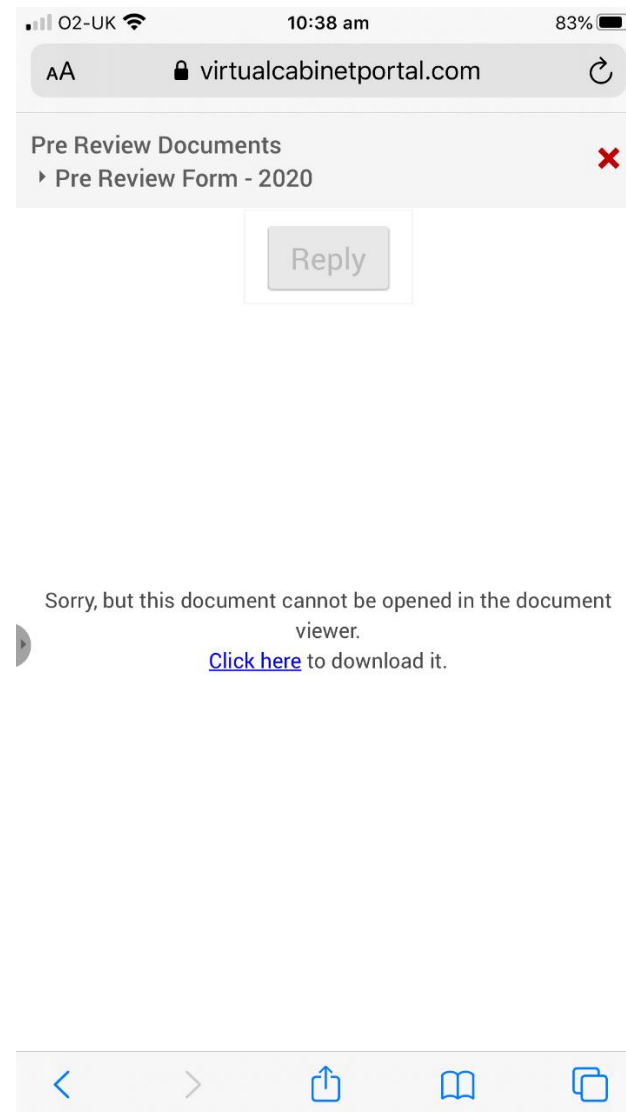
16) This screen will now appear. Select Open in iBooks



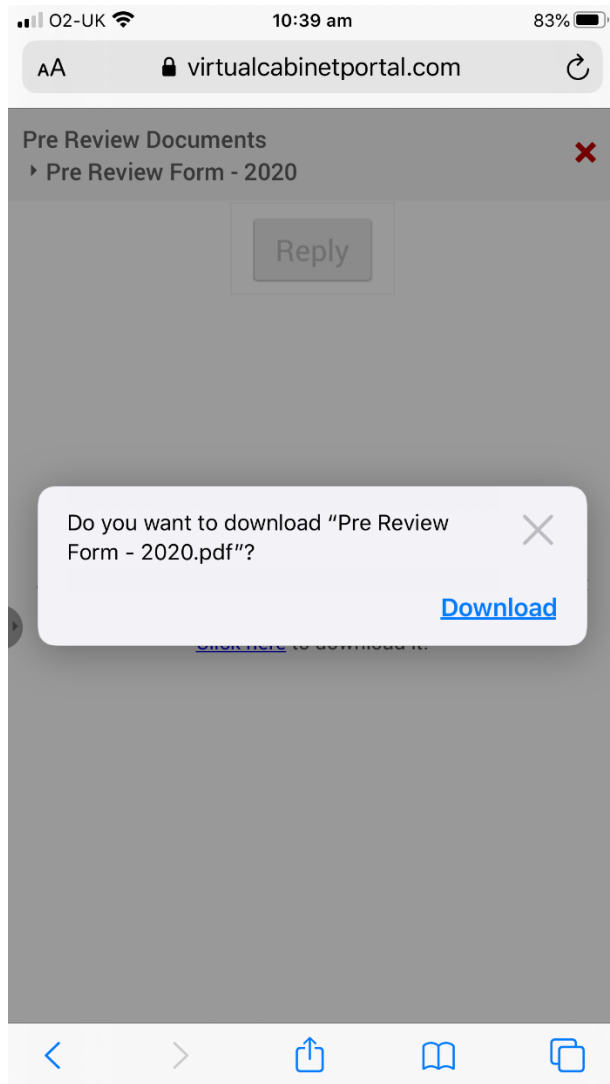
17) This will then save the document in iBooks for your future reference. Now go back to the portal page by clicking back to safari, clicking 'Done' and closing the relevant windows until you see this page



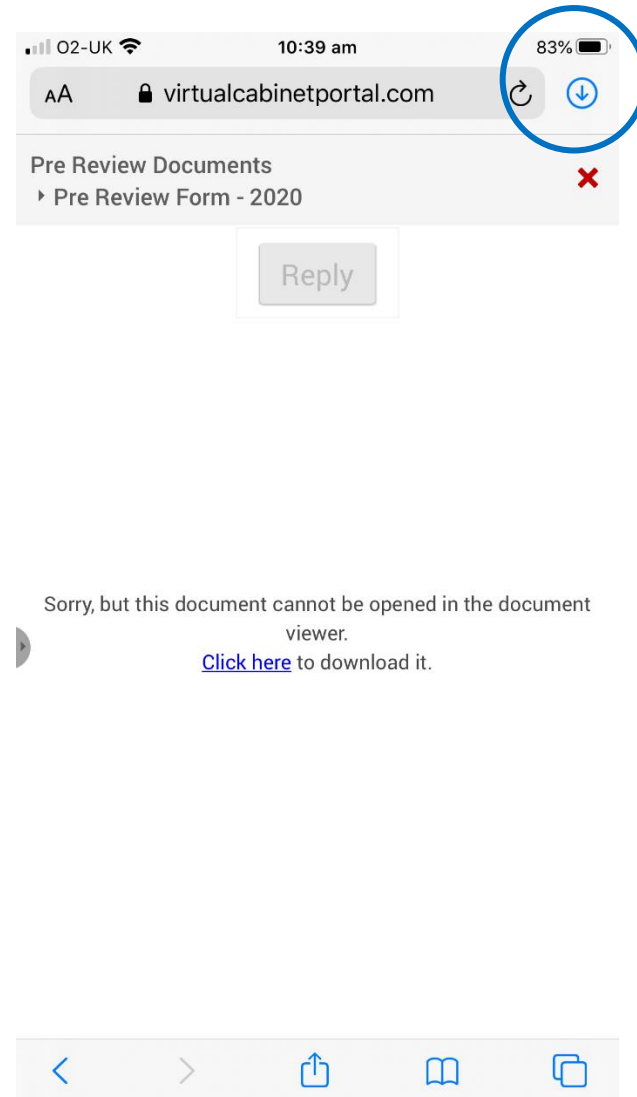
18) Click on Pre Review Form – 2020. Select 'Click here'



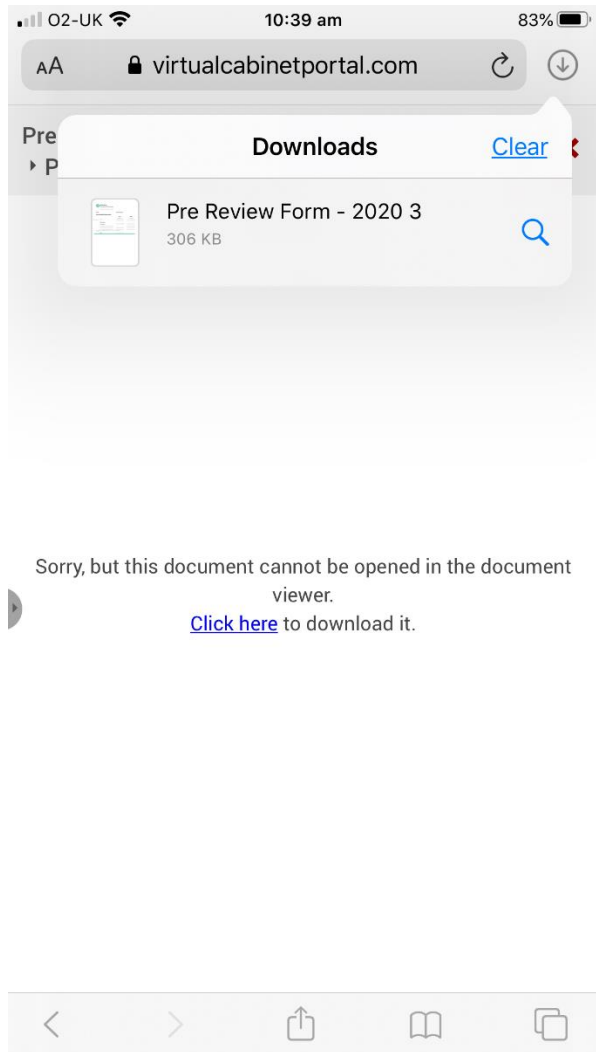
19) Select 'Download'



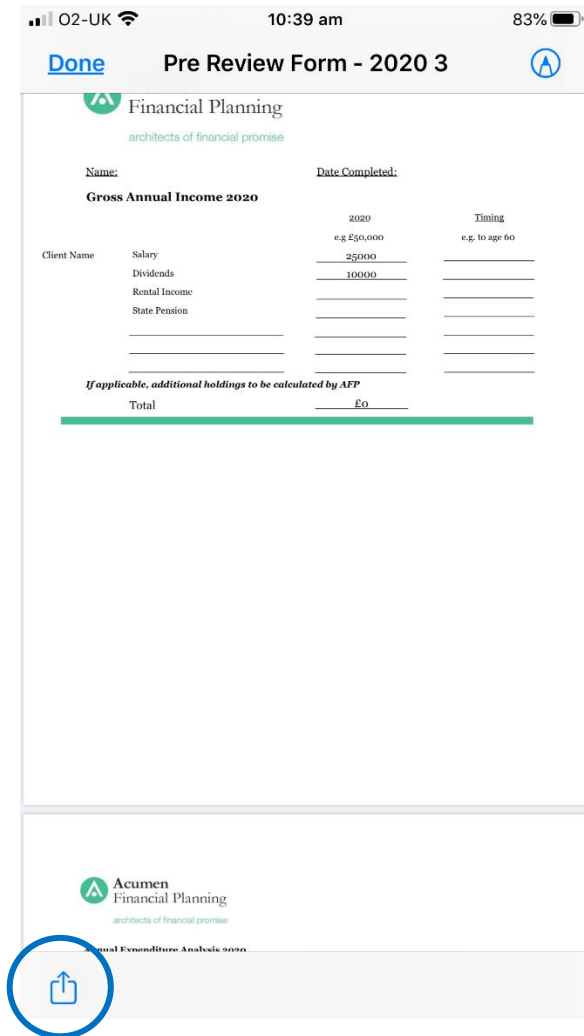
20) The document will then open. Select the downward blue arrow in the top right hand corner



21) Click on the document



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



25) The form can now be completed. Your changes will save automatically.

Done Pre Review Form - 2020 3

Financial Planning
architects of financial promise

Name: _____ Date Completed: _____

Gross Annual Income 2020

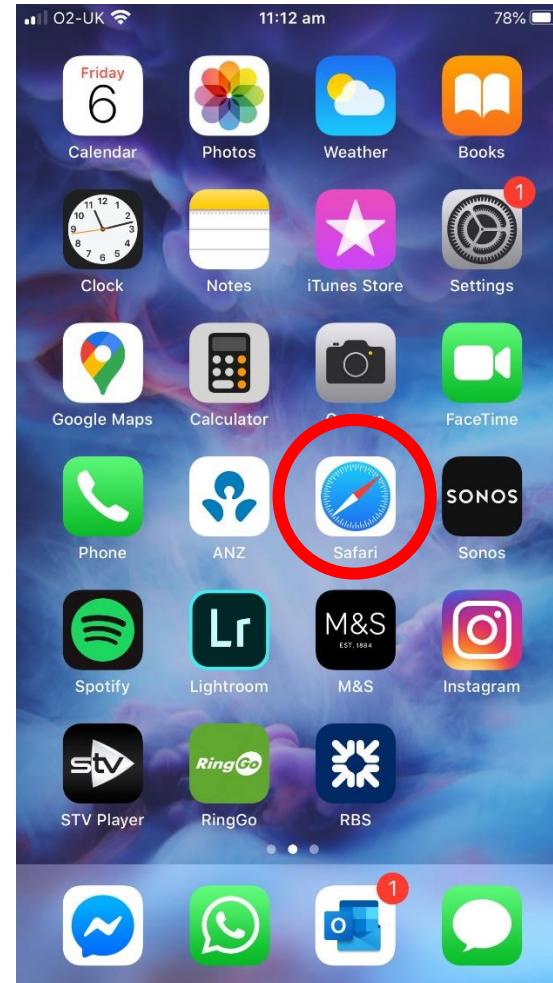
	2020 e.g. £50,000	Timing e.g. to age 60
Client Name		
Salary	25000	
Dividends	10000	
Rental Income		
State Pension		

If applicable, additional holdings to be calculated by AFP

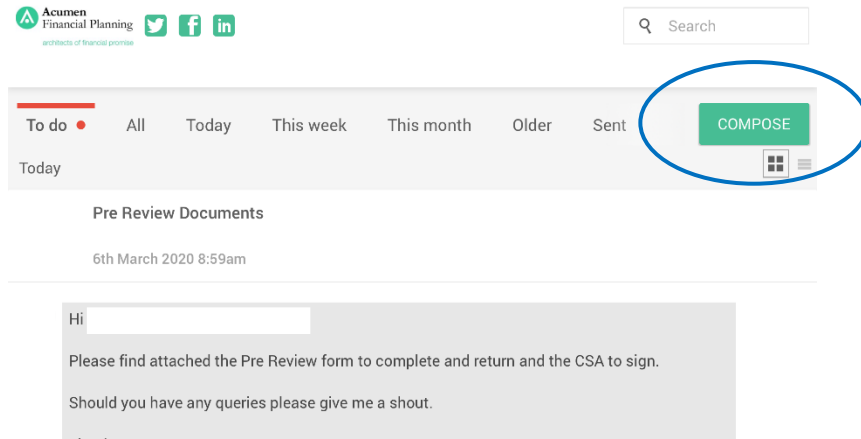
Total £0

Acumen Financial Planning
architects of financial promise
Annual Expenditure Analysis 2020

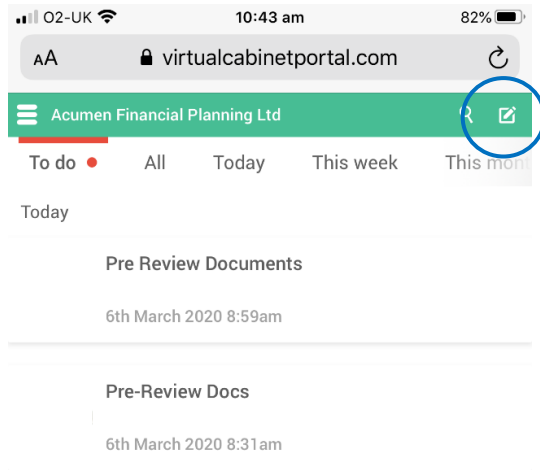
26) When you are finished go back to the portal by hitting your 'Home' button on your device and selecting the 'Safari' icon. You may have to input your portal password again



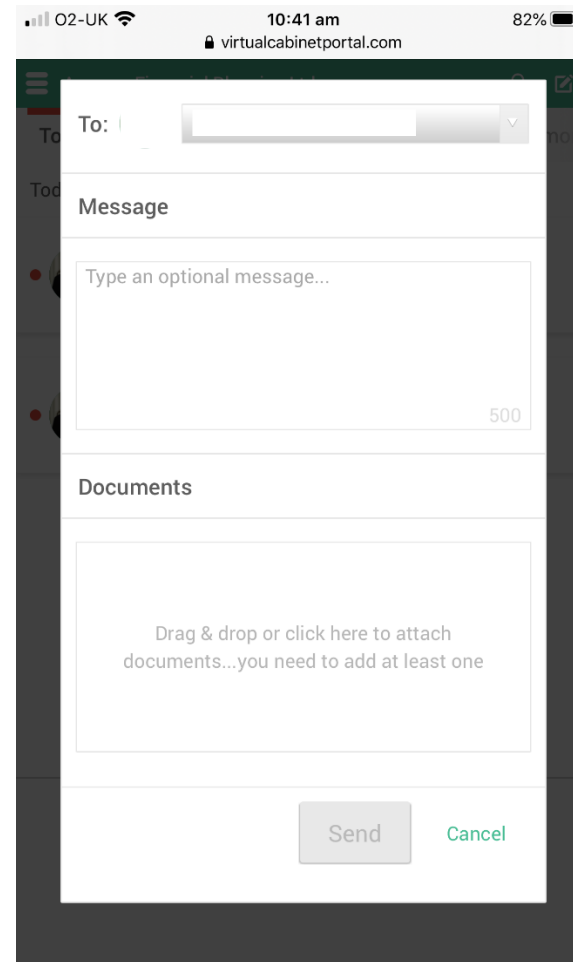
27) Once back in the Portal, turn your phone landscape and you will see a 'Compose' button



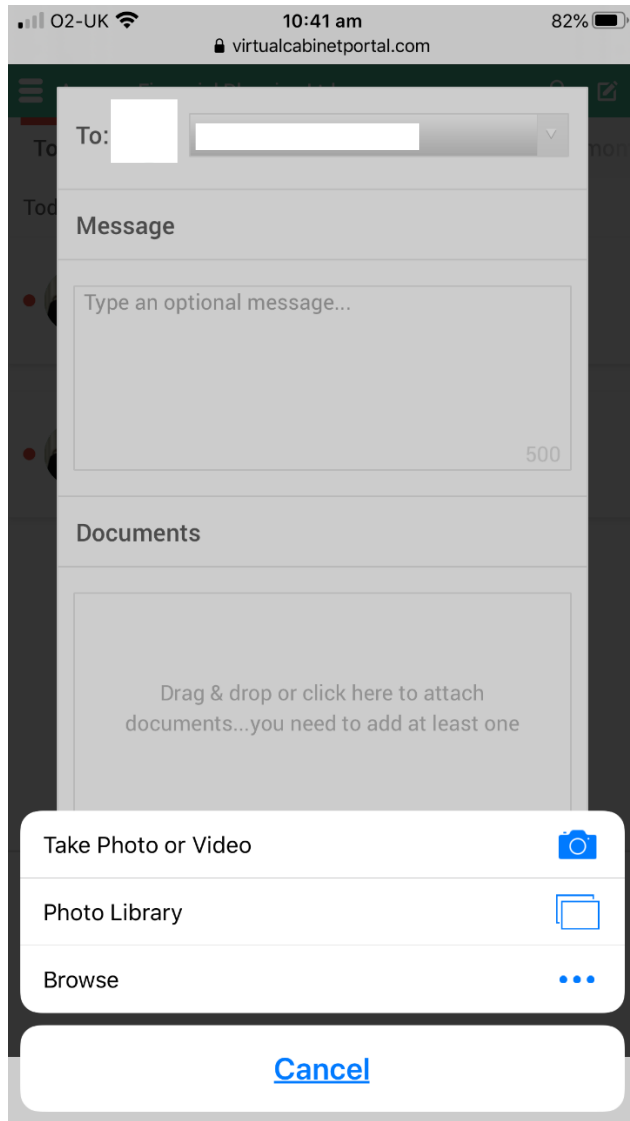
Alternatively keep your phone in portrait mode and click on the icon in the top right hand corner



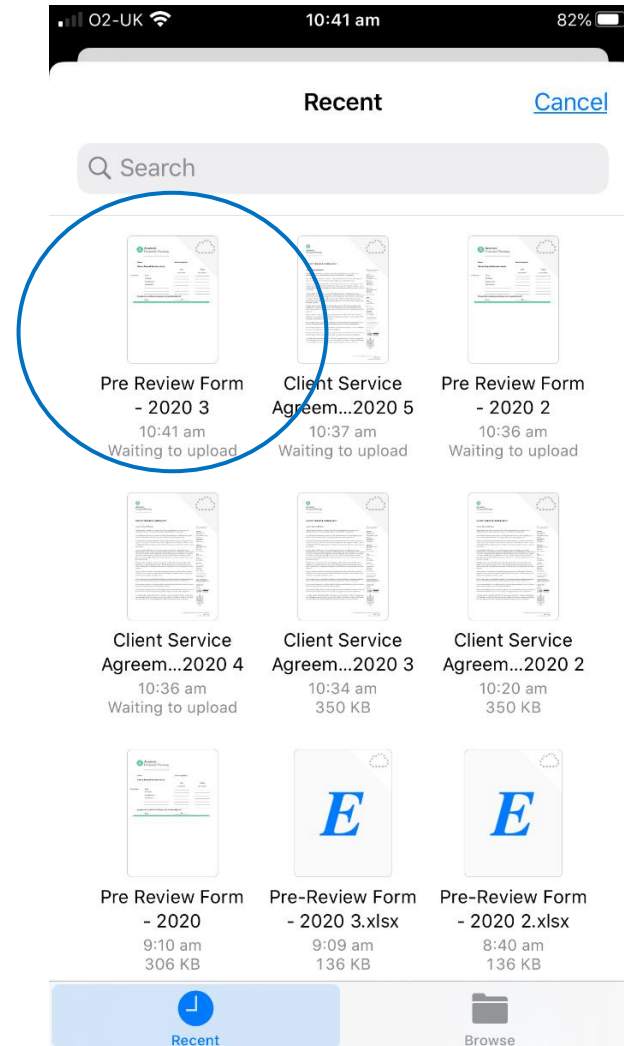
28) This window now appears. You can type a message in the message box if you wish then click on the document box



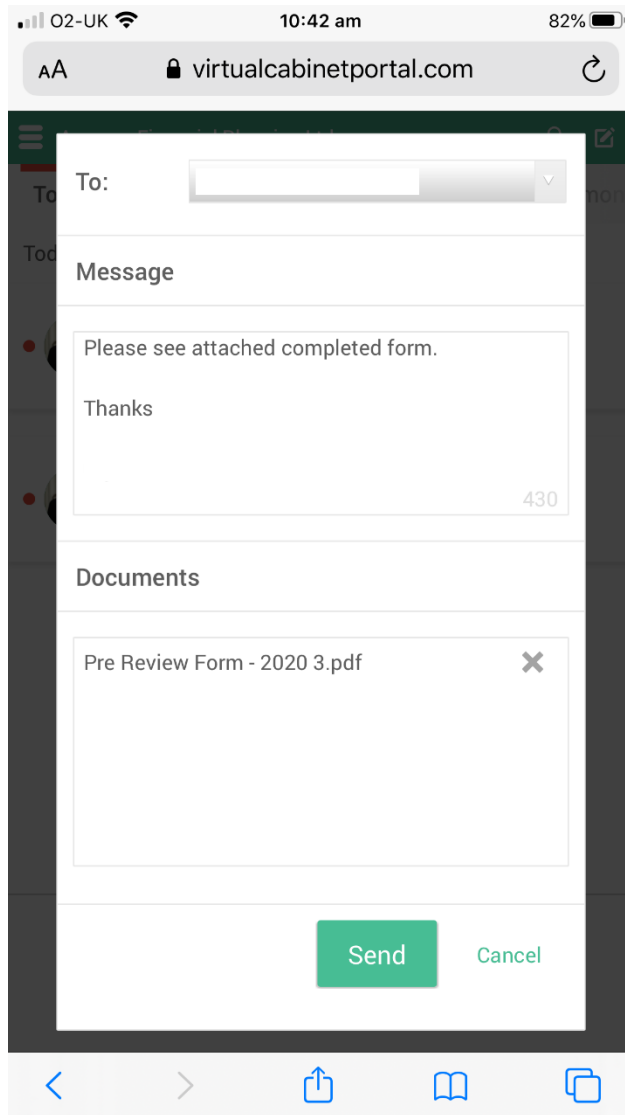
29) Click 'Browse'



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.

