

PERSONAL FINANCE PORTAL (PFP) SETTING UP

Setting up your personal account

All clients use their personal account to exchange messages, documents, and information securely.

The account is called The Personal Finance Portal (PFP) and the log in page is at <https://interface.mypfp.co.uk> where you can read more information and watch a short explanatory video.

One of our team will manually set up your account. During the registration process you will be asked to confirm two random items of information and create your own password.

In order to do this we need you to send us some personal details listed below:

- **Postcode**
- **Date of Birth**
- **Telephone Number**
- **Mobile Number**
- **Middle Name**
- **Maiden Name**
- **National Insurance Number**
- **Annual Salary**

Once we have this information, we can include it in your account and send you an invitation to register. For you to access your account you will need to use your name, email address, and at least two of the personal details you provided.

If you reply quickly your account can often be live within a few minutes, however it could take up to 24 hours to process your request.

For more information, call: **0121 554 4444** or email: enquiries@interface-ifa.co.uk www.interfacefinancialplanning.co.uk