

# OVERVIEW

## PERSONAL FINANCE PORTAL (PFP)

**All clients are provided with their PFP Online account where they exchange messages and documents securely, they view their investments and bank accounts, and they have immediate access to their documents and reports.**

### Secure Messaging Service

Your PFP provides you with a secure messaging service, so you can quickly get in touch with us and have the peace of mind of knowing that any information you share is 100% encrypted and completely private.

With email and post increasingly vulnerable to interception, we treat the security of the data you share with us with the utmost care. We do not send documents to you through the post or by email, instead they are uploaded to your account and you receive an email from us to notify you that you have documents to view.

### View Your Portfolio

PFP enables you to view your portfolio, including your up-to-date portfolio valuations, in one place 24/7 - anywhere, on a PC, Mac, or on any mobile or web device. It allows you to link your bank accounts and view all of your assets and liabilities in one place. It provides an asset register and a money management system.

### Document Vault

The PFP provides you with a secure document vault, so we can share important documents with you, and you have the ability to share your documents with us. This is far more secure than emailing or using post. Your document vault allows you to store all your financial documents Online where they are secure and fully backed up - much safer and more convenient than the bottom of the filing cabinet.

### Your Profile

You can now start to build up your financial profile where you need to complete the information in your Online account and complete a number of questionnaires. Information includes; You & Your Family, Home & Contact and Your Finances, which includes Linking Your Accounts and Income & Expenditure.

Please note that this will require some work by you.

### Self-Help

We are a great believer in self-help because this will reduce our fees and ensure that we can provide you with advice without spending time on gathering information.

A conventional IFA business will ask for an initial fee typically running into four figures for gathering this information whereas we do not charge for this stage of the process. If you would prefer a more conventional approach, please ask and we will quote you accordingly.

### Logging In

Mobile Apps are available for both Apple and Android devices which you can use to access your account on PFP from your smart phone or tablet.

You can also log into your PFP account using any browser on your smart phone or tablet in the same way that you can log in using your laptop (PC or Mac), however, most clients find the Mobile Apps to be more user friendly.

### Quick Links:

- [Interface Financial Planning](#)
- [The Personal Finance Portal](#)
- [PFP on Apple \(App Store\)](#)
- [PFP on Android \(Google Play\)](#)