

# PERSONAL FINANCE PORTAL (PFP)

## UPDATING YOUR PROFILE

### Adding and updating your information

We ask our clients to provide their details and complete documents online. This means that we spend our time discussing and helping them with the important issues instead of gathering data (this also keeps our charges down).

Please complete your profile as much as possible - this information synchronises back to our main system, so you can ensure that we hold the correct details for you.

After you log in to PFP on the main screen click on 'Go to Your Profile' on the next screen you will see three sections.

1. **You & Your Family**
2. **Home & Contact**
3. **Your Finances**

PFP has continued to improve and develop over the years and there are further developments in the pipeline, so areas may appear different from the last time you completed the profile. Each section is broken down into further categories and they are considered below;

### 1. You & Your Family

This section is broken down into 3 sections and is quick and simple to check and amend if needed. The three sections are;

- **About You**  
Check your full name, date of birth, marital status, NI Number, and there are questions on your Will, Residency, your Health and you can also add a photo of yourself
- **Your Family**  
Add any details of your closest family members, this can include; Spouse or Partner, Child or Grandchild, Parents or Grandparents. It will ask their date of births and whether they are financially dependent on you.  
**Knowledge of your children and wider family may influence manly areas of our advice.**
- **Employment**  
Since last updating your profile you may have changed jobs, reduced your hours or retired so if this has changed please update it.  
Even if your employment is still the same you could have increased or decreased your income this can be amended here.

### 2. Home & Contact

This section is broken down into 2 sections and is quick and simple to check and amend if needed. The two sections are;

- **Your Home**
- **Contact Details**

If have moved home address, changed your landline or mobile number and have an alternative email address, please check and update this information.

### 3. Your Finances

Technological developments and Open Banking has led to the 'Your Finances' section being completely redeveloped. It is broken down into 2 sections;

- **Assets & Liabilities**
- **Income & Expenditure**

You may also notice that on the right hand side of the screen a box called **Linked Accounts** and a button called '**Link New Account**'.

We encourage you all to **Link your Bank Accounts to PFP** using your Open Banking. The ability to link all of your accounts so that you can monitor your income and expenditure and have a full overview of your finances in one secure place. This secure environment does not have any access to, or control of, your bank accounts and so it is far safer than logging on directly to each individual bank account.

If you click on **Link New Account** there will be a list of providers, chose yours and then follow the instructions and enter your internet banking credentials to link your account

Once you have linked your accounts you can then click on the '**Update Income**' & '**Update Expenditure**' buttons, follow the on-screen instructions and the information will automatically be populated in the '**Income and Expenditure**' section.

*If you need further guidance on this please send us a secure message and we will happily send you our guides and we are happy to help you set this up.*

#### **Other Accounts & Policies**

Some policies may have to be entered manually, by clicking '**Add Account Manually**.' This will include any providers that are not listed on the linked accounts section, Pensions, Insurances, Investments including NS&I, ISAs & Shares

Alternatively, if you experience any difficulties you can upload a copy of the policy statement to us via your PFP Secure Messages and we can help enter the details.

**It is essential that we complete this section comprehensively to understand your current situation, before advising on you on your future objectives.**