

Aviva Platform



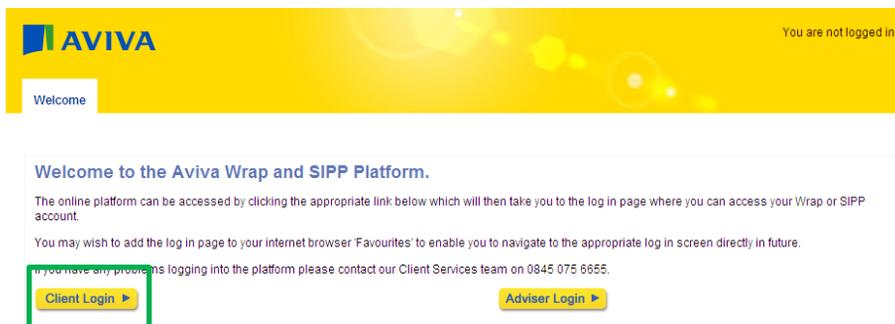
How to access your online account

Accessing the Aviva Platform for the first time

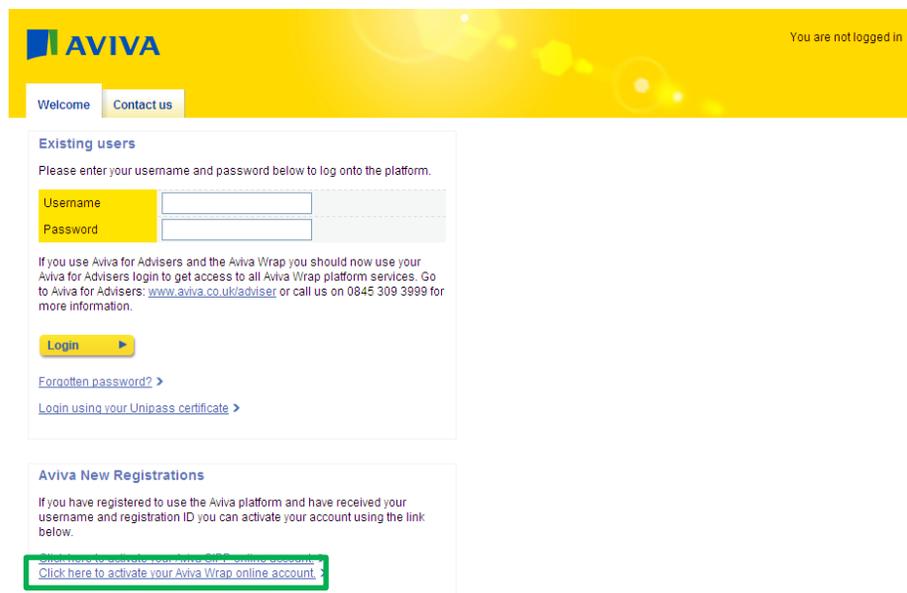
Having received your username and registration number from Aviva, you're now able to access the Aviva Platform.

The Aviva Platform is available online seven days a week and can be accessed by entering the website address <http://www.aviva.co.uk/wrap> into your internet browser.

When you access the site, the first page you'll see is the welcome page shown below. Click on **Client Login** to go to the page you'll need.



This will take you to the Login page below. Under 'Aviva New Registrations' you'll see a link called **Click here to activate your Aviva Wrap online account**. Click on that to be taken to the next page.



Online registration

Before using the platform for the first time, you first need to register. Enter the username and registration number given to you in the Welcome and Registration letters you received from Aviva into the first two fields shown on the registration page below.

You also need to enter your email address plus a password of your own choosing but which must follow the guidelines shown below.

The screenshot shows the Aviva online registration page. At the top, there is a yellow header with the Aviva logo on the left and the text "You are not logged in" on the right. Below the header, there are two tabs: "Registration" (selected) and "Contact us". The main content area is titled "Online registration" and contains a paragraph of introductory text. Below this is a registration form with several fields: "Username", "Registration number", "Enter email address", "Enter new password", "Password strength:", "Confirm password", and "Unipass certificate". The "Unipass certificate" field has a value of "Not provided" and an "Add" button. To the right of the form, there are explanatory text blocks for each field. At the bottom right of the form, there is a "Submit" button.

Once you've confirmed your password and checked that you've entered the information correctly, click **Submit**. A screen confirming that you're now registered will appear, as below. Click **Login** and you'll be able to access the Aviva Platform using your username and the new password you've chosen.

The screenshot shows the Aviva online registration completion screen. At the top, there is a yellow header with the Aviva logo on the left and the text "You are not logged in" on the right. Below the header, there are two tabs: "Registration" (selected) and "Contact us". The main content area is titled "Registration completed" and contains a paragraph of text: "Thank you for registering to use this service. You can now access the service with the username [redacted] and the password you have just provided. Click to login to continue." At the bottom right of the main content area, there is a "Login" button.

Legal

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Logging into the Aviva Platform

If you can't remember your password you can select the **Forgotten password?** link found underneath the login area. This will take you to the Forgotten password? page where entering your username will generate an e-mail to you containing instructions on how to create a new password.

AVIVA You are not logged in

Welcome Contact us

Existing users

Please enter your username and password below to log onto the platform.

Username

Password

If you use Aviva for Advisers and the Aviva Wrap you should now use your Aviva for Advisers login to get access to all Aviva Wrap platform services. Go to Aviva for Advisers: www.aviva.co.uk/adviser or call us on 0845 309 3999 for more information.

Login ▶

Forgotten password? >

[Login using your Unipass certificate >](#)

Aviva New Registrations

If you have registered to use the Aviva platform and have received your username and registration ID you can activate your account using the link below.

[Click here to activate your Aviva SIPP online account >](#)

[Click here to activate your Aviva Wrap online account >](#)

Client summary

Having logged in and assuming you have more than one portfolio, the next page you'll see is the Client summary, shown below. This page provides an accurate valuation of each of your portfolios which are updated on a daily basis.

AVIVA You are logged in as:
 Logout ▶

Clients Admin Contact us

Wrap summary > Client summary 03 Jun 2013 14:48:00

Account detail Download PDF

Client summary

Name: Maureen

Client reference:

Adviser:

Type	Product Level	Account ID	Joint owners)	Valuation €	% of portfolio
ISA Portfolio		2		48,630.84	20.36
Investment Portfolio		2		13,514.10	5.66
Pension Portfolio Post Retirement	Choice	2		15,782.37	6.81
Pension Portfolio Post Retirement		2		1,800.48	0.75
Pension Portfolio Pre Retirement	Choice	2		159,123.75	68.82
Memo assets				0.00	0.00
Portfolio Total				238,851.54	

Investments

Asset (Expand all)	Total cost £	Quantity	Last price £	Value €	% of holding
Cash account				177,695.01	74.40
Premier Sentinel Defensive Portfolio B Acc	11,347.87	9,037.472000	1.174000	11,549.20	4.84
Premier Sentinel Enterprise Portfolio B Acc	17,584.11	16,127.345000	1.155500	18,635.15	7.80
Premier Sentinel Universal Portfolio B Acc	20,583.82	22,839.184000	1.356100	30,972.19	12.97
Total Holding				238,851.54	

This page is split into three main areas. The first part contains basic client information. You can view more detail by clicking on the client name, which will take you to the following page.



The screenshot shows the AVIVA website interface. At the top left is the AVIVA logo. At the top right, it says "You are logged in as:" followed by a "Logout" link. Below the logo are three navigation tabs: "Clients", "Admin", and "Contact us". The main content area has a breadcrumb trail "Wrap summary > View client" and a heading "View client". Below this is a form containing client information:

Client reference:
Personal details	
Title:	Mrs
Forename:	Maureen
Surname:	
Sex:	Female
Marital status:	
Date of birth:	19/08
Nationality:	
National Insurance no:	
Country of residence:	United Kingdom
Employment status:	
Contact details	
Home:	023 756
Mobile:	
Work:	

Please note that if any of your details are incorrect you should contact your adviser who will be able to change them on your behalf.

The next section details the open product portfolios you hold, the portfolio number and the current value of each one.

The final section shows the different investments you've chosen and the proportion of your overall valuation that each investment represents.

The screenshot shows the Aviva Client summary page. At the top, there is a yellow header with the Aviva logo and a 'You are logged in as:' section with a 'Logout' link. Below the header, there are navigation tabs for 'Clients', 'Admin', and 'Contact us'. The main content area is titled 'Client summary' and includes a breadcrumb trail 'Wrap summary > Client summary' and a timestamp '03 Jun 2013 14:48:00'. There are links for 'Account detail' and 'Download PDF'. The client's name is 'Laureen'. Below this, there is a table of portfolios:

Type	Product Level	Account ID	Joint owner(s)	Valuation £	% of portfolio
ISA Portfolio		2		48,630.84	20.36
Investment Portfolio		2		13,514.10	5.66
Pension Portfolio Post Retirement	Choice	2		15,782.37	6.61
Pension Portfolio Post Retirement	Choice	2		1,800.48	0.75
Pension Portfolio Pre Retirement	Choice	2		159,123.75	66.62
Memo assets				0.00	0.00
Portfolio Total				238,851.54	

Below the portfolio table is an 'Investments' section with a table showing the breakdown of assets:

Asset (Expand all)	Total cost £	Quantity	Last price £	Value £	% of holding
Cash account				177,695.01	74.40
Premier Sentinel Defensive Portfolio B Acc	11,347.87	9,837.472000	1.174000	11,549.20	4.84
Premier Sentinel Enterprise Portfolio B Acc	17,584.11	16,127.345000	1.155500	18,635.15	7.80
Premier Sentinel Universal Portfolio B Acc	28,583.82	22,839.164000	1.356100	30,972.19	12.97
Total Holding				238,851.54	

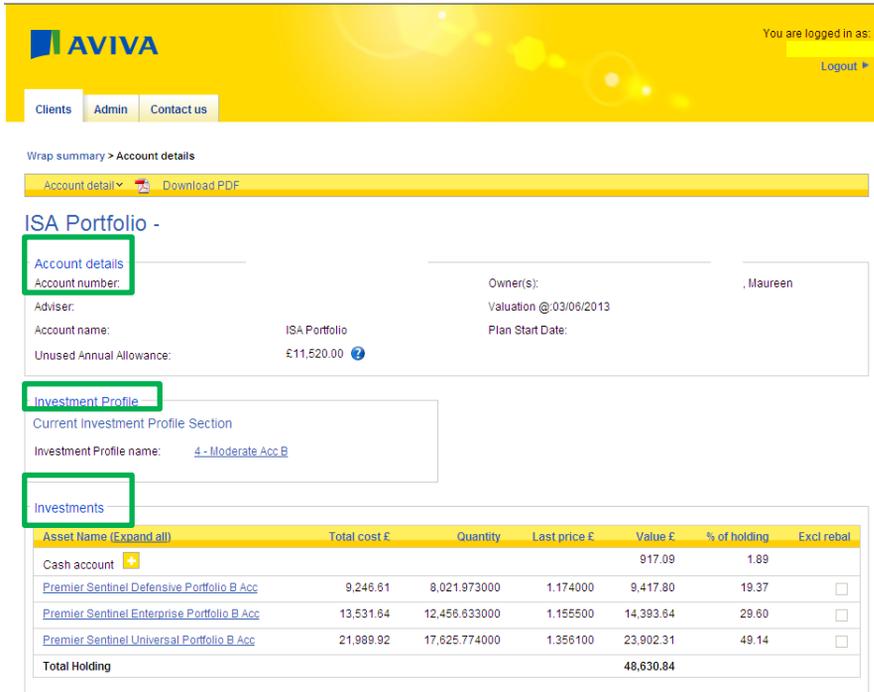
You can also view details on specific portfolios that you hold. To do this click the portfolio name listed in the 'Type' section of the Client summary page. This will take you to the page of the portfolio that you have selected.

If you only hold one portfolio, upon logging into the Aviva Platform you'll be taken directly to the Portfolio page for the product you hold, rather than to a Client summary page.

Portfolio page

The Portfolio page provides an overview of the individual portfolio and its composition. In the Account details section you can view basic adviser and account details while in the two remaining sections you will see details of your investments relevant to your product portfolio.

Below are two examples of different product portfolio pages with the second one identifying that trades are currently being undertaken (Transactions in progress).



AVIVA You are logged in as: [Name] Logout

Clients Admin Contact us

Wrap summary > Account details

Account detail Download PDF

ISA Portfolio -

Account details

Account number: [Number] Owner(s): [Name], Maureen

Adviser: [Name] Valuation @: 03/06/2013

Account name: ISA Portfolio Plan Start Date: [Date]

Unused Annual Allowance: £11,520.00

Investment Profile

Current investment Profile Section

Investment Profile name: [4 - Moderate Acc B](#)

Investments

Asset Name (Expand all)	Total cost £	Quantity	Last price £	Value £	% of holding	Excl rebal
Cash account +				917.09	1.89	
Premier Sentinel Defensive Portfolio B Acc	9,246.61	8,021.973000	1.174000	9,417.80	19.37	<input type="checkbox"/>
Premier Sentinel Enterprise Portfolio B Acc	13,531.64	12,456.633000	1.155500	14,393.64	29.60	<input type="checkbox"/>
Premier Sentinel Universal Portfolio B Acc	21,989.92	17,625.774000	1.356100	23,902.31	49.14	<input type="checkbox"/>
Total Holding				48,630.84		

Pension Portfolio Post Retirement - 2

Account details

Account number: [Number] Owner(s): Maureen

Adviser: [Name] Valuation @: 03/06/2013

Product Level: Choice Plan Start Date: [Date]

Beneficiary: [Name]

Investment Profile

Current investment Profile Section

Investment Profile name: [4 - Moderate Income Acc B](#)

Investments

Asset Name (Expand all)	Total cost £	Quantity	Last price £	Value £	% of holding	Excl rebal
Cash account +				15,782.37	100.00	
Total Holding				15,782.37		

Transactions in progress

Trades

Instruction	Asset Name (Expand all)	Amount £	Status	Trade ID	Last updated
Transfer proceeds	Premier Sentinel Enterprise Portfolio B Acc +	3,945.59	Ordered	1: 39	08/05/2013
Transfer proceeds	Premier Sentinel Defensive Portfolio B Acc +	5,208.18	Ordered	1: 39	08/05/2013
Transfer proceeds	Premier Sentinel Universal Portfolio B Acc +	6,312.95	Ordered	1: 39	08/05/2013

As you can see from the screen page below, by clicking on one of the assets listed under Asset Name, another screen will appear identifying the different funds that make up that particular investment portfolio and the proportion of each fund within it.

Pension Portfolio Post Retirement - 2

Account details
 Account number: 2 Owner(s): Maureen
 Adviser: Valuation @ 03/08/2013 £15,782.37
 Product Level: 2013
 Beneficiary:

Investment Profile
 Current investment profile: 4 - Moderate Income Acc B
 Investment Profile name: 4 - Moderate I
 Effective date: 08/08/2012
 Short name: 4 - Moderate I
 Status: Open
 Last Updated: 08/08/2012

Investments

Asset Name (Expand all)	Fund name	Split %
Cash account	Cash	2.00
	Premier Sentinel Defensive Portfolio B Acc	33.00
	Premier Sentinel Enterprise Portfolio B Acc	25.00
	Premier Sentinel Universal Portfolio B Acc	40.00
Total Holding		

Transactions in progress
 Trades
 Instruction
 Transfer proceeds
 Transfer proceeds
 Transfer proceeds

Legal

Close ▶

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Correspondence

To view online the correspondence sent by Aviva, click on **Account detail** and then click on the pop-up **Correspondence** tab.

AVIVA You are logged in as: [Name] Logout ▶

Clients Admin Contact us

Wrap summary > Client summary 07 Jun 2013 14:02:58

Account detail (selected) Download PDF

Correspondence (selected)

Name: _____
 Client reference: _____
 Adviser: _____

Type	Product Level	Account ID	Joint owner(s)	Valuation £	% of portfolio
Aviva SIPP Post Retirement				139,876.44	89.41
Aviva SIPP Pre Retirement				10,574.95	10.59
Memo assets				0.00	0.00
Portfolio Total				156,451.39	

Investments

Asset (Expand all)	Total cost £	Quantity	Last price £	Value £	% of holding
Cash account				198.90	0.13
Aviva Ins Funds Corporate Bond SR	16,077.85	17,419,127.100	1.508100	26,269.79	16.79
Aviva Ins Funds Property SR	22,435.20	28,235,456.000	0.904200	27,224.63	17.40
Cazenove Mult Manager Diversified Tactical A Acc	30,663.04	51,691,898.000	0.961500	49,701.76	31.77
Cazenove Mult Manager Diversity Acc	12,720.61	20,143,491.000	0.957900	19,295.45	12.33
M&G Managed Growth Class X Line	20,790.32	42,588,228.000	0.793100	33,760.88	21.58
Total Holding				156,451.39	

By clicking on the Correspondence tab, you'll be taken to the screen page below in which the table provides various pieces of information about the correspondence we've sent you. To view a piece of correspondence, just click on the relevant item under 'Description'.

AVIVA

You are logged in as: [Name] Logout

Clients Admin **Contact us**

Wrap summary > Correspondence

Account detail

Correspondence

Client: [Name]

Client number: [Number]

Showing All correspondence for All accounts for 07/12/2012 - 07/06/2013

Search

(1 of 1) 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

Letter id	Description	Account type	Account	Date sent
11 20	N00 - Account Ad Hoc Letter	Aviva SIPP Post Retirement		29/05/2013
11 71	P60A - HMRC P60 Form	Aviva SIPP Post Retirement		17/05/2013
11 39	Terms and Conditions mailing			16/02/2013
10 30	N51 - Wrap Level BI-Annual Client Level Statement			24/01/2013

(1 of 1) 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

If you need to discuss any aspect of your account, you should contact your adviser in the first instance. If you need to contact Aviva you can click on the **Contact us** tab where you'll find our telephone number, email address and postal address.

AVIVA

You are logged in as: [Name] Logout

Clients Admin **Contact us**

Contact us

If you have a query or problem you can contact the Client Services team via phone:

Advisers: 0845 075 6655
 Clients: 0845 075 6655

Phone lines are open 8am to 6pm

Or e-mail:
wrapclientservices@aviva.co.uk

By post:
 Aviva
 PO Box 26957
 Glasgow
 G2 9DS

Alternatively you can contact your Aviva Consultant

With the help of this guide you should now be able to navigate your way around the Aviva Platform to view information and keep track of your investments.

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