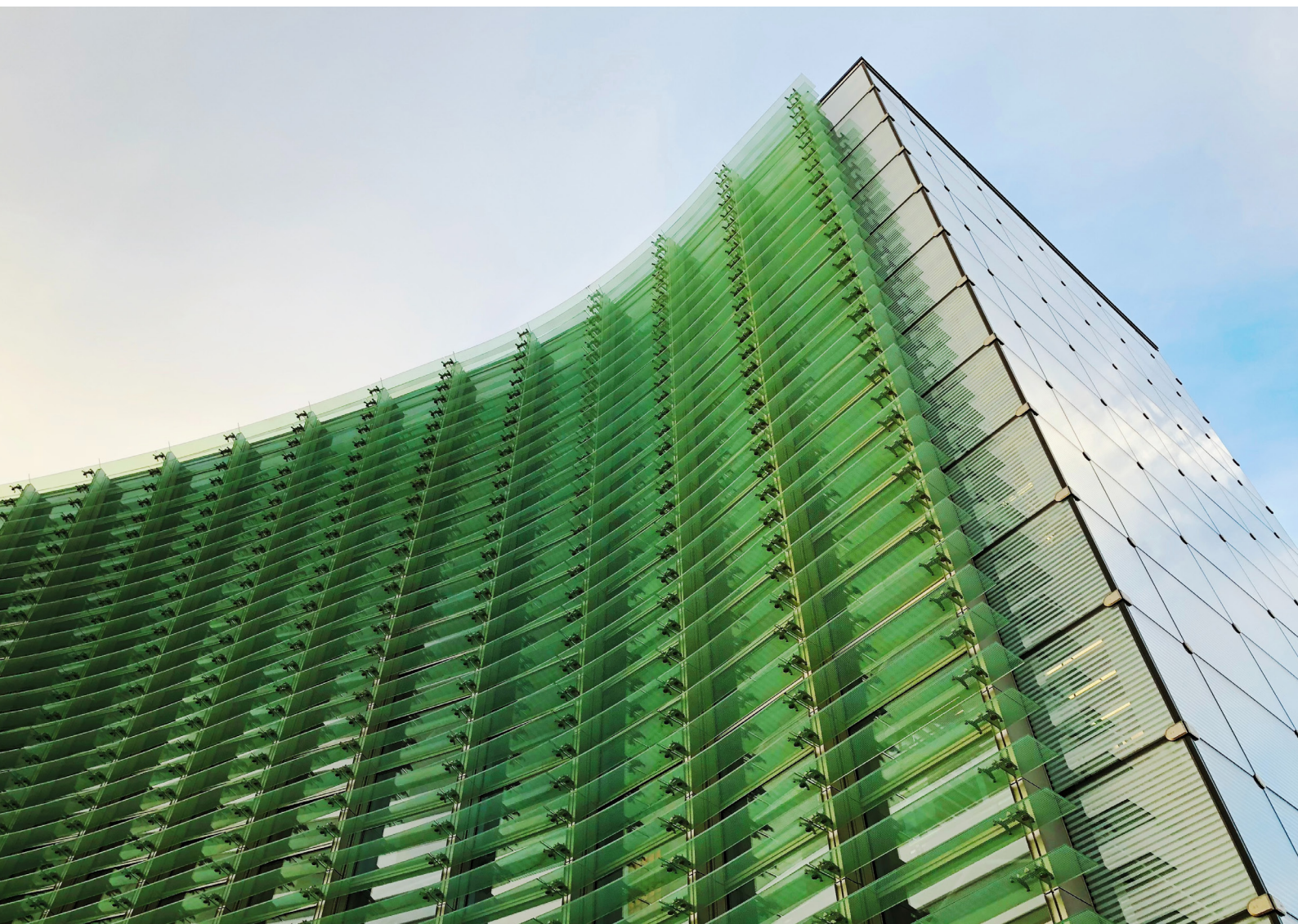




Prudential ISA Online Services

# Customer FAQs Registering for the Service

Frequently asked questions for Investors using the Prudential ISA online services digital portal



## 1.0 Registration

### 1.1 WHY SHOULD I REGISTER?

The Prudential ISA is a digital proposition and as such you will need to register to enable you to pick up and view your important documents, like contract notes and your quarterly statements. We currently only provide access to view information on your ISA, but we're continually looking to develop the service and we'll notify you of any developments as they arrive.

By registering for the service you'll also be able to:

- View the current value of your ISA and see how your ISA has performed over the previous 12 months
- View recent and historic transactions, which you can filter to see specific types of transaction like money in, money out and charges.

If you actively use an adviser to manage the ISA on your behalf, you should still register to ensure you are able to pick up and view your important documents. An email notification will be sent to your registered email address every time a new document is ready for you to view online.

### 1.2 HOW DO I REGISTER?

There are now three ways you can register and gain access to the Prudential ISA online service:

1. You can register yourself by following the link on the Prudential ISA online login page
2. Your adviser can send you an invitation to register
3. If your adviser submits an online instruction on your behalf, you'll be notified of this by email where you'll be able to access a summary of that instruction and you'll also be provided with the option to register.

## 2.0 Self-serve Registration

### 2.1 HOW DO I BEGIN?

You can start the registration process by navigating to the existing login page for all Prudential ISA users <https://pruisa.waystone.com/auth/login> and selecting the “you can register here” hyperlink as shown below.



## Welcome to your Prudential ISA Online Services

### Log into your account

Please enter your username and password provided by Waystone Financial Investments Limited to use the online service.

Are you an investor not yet registered for online access? [You can register here](#)

Username ?

Password ?

[Show](#)

[Forgotten your password?](#)

☐

I'm not a robot



Next

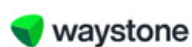
[Need help?](#)





## 2.2 WHAT HAPPENS NEXT?

Before you start, you'll be presented with a page that gives you some general guidance and can begin registration by selecting the start button, as shown below.






### Welcome to your Prudential ISA Online Services

#### Investor registration - before you begin

In the next few steps you'll be asked to provide some personal information for security purposes.

##### What you'll need to proceed

-  A verification code that we send to you by post. If you've received this, have it ready before you proceed.
-  If you haven't received a verification code from us, don't worry you'll be able to request it later in the process.
-  Please note the verification code is only valid for 60 days. If your verification code letter is dated more than 60 days ago, you'll need to request a new one, which you'll be able to do later in the process.

By registering for online access you'll have access to your Prudential ISA whenever you need it, and all your documentation will be provided digitally in your own personal document store, helping you and us reduce our impact on the environment.

Click the Start button below to start the registration process.



Start



### 2.3 WHY DO YOU NEED MY PERSONAL DETAILS?

To be able to register and create your online account, we need to verify your identity against our records. We ask you to enter the following information...

- Our investor ID – this can be found on your quarterly statement
- Your date of birth
- Your National Insurance number or confirm to us you don't have one.



## Welcome to your Prudential ISA Online Services

Please provide the following information

Investor ID

Date of birth

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

National insurance number

☐ I don't have a National Insurance number

Next

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



2.4 I PROVIDED MY PERSONAL DETAILS AND THE MESSAGE STATES THEY DO NOT MATCH. WHAT IS THE PROBLEM?



## Welcome to your Prudential ISA Online Services

Please provide the following information

Investor ID

123456

Date of birth

Day Month Year  
01 / 01 / 2000

National insurance number

AB123456D

☐ I don't have a National Insurance number



Sorry we couldn't match your details, please check and try again.

Next



The details you provided do not match with what we have on record. You should double check that the information you provided online is correct. If you are still receiving the message, please contact our Customer Services on 0344 335 8936 who can investigate this further.



## 2.5 I PROVIDED MY PERSONAL DETAILS AND THE MESSAGE STATES I ALREADY HAVE AN ACCOUNT. WHAT ARE MY LOGIN DETAILS?

### Welcome to your Prudential ISA Online Services

Please provide the following information

Investor ID

607866

Date of birth

Day / Month / Year  
07 / 04 / 1961

National insurance number

NZ618962C

☐ I don't have a National Insurance number



We have identified you already have a digital account, [click here to login.](#)

Next

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



The details you provided indicate that you are already registered for an online account. You can select the “click here to login” hyperlink which will take you to the login page.

If you are already registered and not aware of this, it could be because your adviser may have invited you for registration.

Your username is your email address. If you do not know what email address we have against your record, you can contact our Customer Services team on 0344 335 8936 and we can confirm your email address.

If you do not know your password, you can navigate to the login screen and select the ‘Forgotten Password’ link and we will send you a link to enable you to reset your password.

## 2.6 VERIFICATION CODE



### Welcome to your Prudential ISA Online Services

Have you received your verification code in the post?

[Here is an example of the verification code letter.](#)



Yes



No

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



Once we have verified your identity, you will be taken to the next screen where you will be asked if you have received your verification code in the post. You can select the corresponding radio button (Yes/No) to proceed.

If you need to request a code, select the No radio button and Request Code. The next screen will provide details on what the next steps are.



## What happens next

### Verification code requested

We'll post out to you a letter with your verification code, which you should receive in the next couple of days.

Once you receive the verification code, follow the instructions in the letter to complete the registration process.

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



## 2.7 I HAVE REQUESTED A VERIFICATION CODE BUT STILL HAVEN'T RECEIVED ANYTHING. HOW LONG SHOULD I EXPECT TO WAIT?

The letter containing your verification code will be generated and posted to your registered postal address using WHISTL in two to three days. If you have not received the letter after five working days, you can request a new verification code by selecting the "No" radio button and selecting the "Request code button" to generate a new code.



## What happens next

### Verification code requested

We'll post out to you a letter with your verification code, which you should receive in the next couple of days.

Once you receive the verification code, follow the instructions in the letter to complete the registration process.

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)





## 2.8 I HAVE RECEIVED MY VERIFICATION CODE BUT WHEN I KEY IT IN, IT IS SAYING THE CODE IS INVALID. WHAT DO I DO?



### Welcome to your Prudential ISA Online Services

Have you received your verification code in the post?

[Here is an example of the verification code letter.](#)

☒ Yes ☐ No

Enter verification code (case sensitive)

TEST123

Unable to find any active verification code to validate.

Verify

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



Please double check to ensure you are keying the verification code correctly. The verification code is case-sensitive and does not contain vowels, ensure you have correctly keyed in upper- and lower-case characters and check that no spaces are keyed in before or after the code. If you are still struggling, you can use the Request Code button to generate a new code.

## 2.9 I HAVE RECEIVED MY VERIFICATION CODE BUT WHEN I KEY IT IN, IT IS SAYING THE CODE HAS EXPIRED. WHAT DO I DO?



### Welcome to your Prudential ISA Online Services

Have you received your verification code in the post?

[Here is an example of the verification code letter.](#)

☒ Yes ☐ No

Enter verification code (case sensitive)

pMRmG534

Unfortunately the verification code you have provided has already expired and can't now be used for registration. Click the Request Code button below to get a new verification code.

Request code

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).



The verification code is valid for 60 days. If the code has expired, you can use the Request Code button to generate a new code.

## 2.10 EMAIL ADDRESS CONFIRMATION



### Welcome to your Prudential ISA Online Services

#### Complete a few simple steps to log in

Please confirm your email address. You'll use this in future as your username every time you login and we will use this to notify you about any new documents which are available for you to view online.

Email address

Re-enter email address

Submit

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



Once the verification code has been accepted, the next screen will ask you to confirm your email address. We ask you to re-enter your email address to ensure you have entered the email address correctly.

## 2.11 I AM KEYING IN MY EMAIL ADDRESS, BUT I GET AN ERROR MESSAGE SAYING THEY DO NOT MATCH.



### Welcome to your Prudential ISA Online Services

#### Complete a few simple steps to log in

Please confirm your email address. You'll use this in future as your username every time you login and we will use this to notify you about any new documents which are available for you to view online.

Email address

example1@waystone.com

Re-enter email address

example2@waystone.com

Entered email addresses do not match, please check, and try again.

Submit

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



Both fields where you keyed in your email address must be identical. Check to make sure they are the same and that no spaces have been added before or after the email address.



## 2.12 I AM KEYING IN MY EMAIL ADDRESS, BUT I GET AN ERROR MESSAGE SAYING THE EMAIL ADDRESS IS NOT VALID.



### Welcome to your Prudential ISA Online Services

#### Complete a few simple steps to log in

Please confirm your email address. You'll use this in future as your username every time you login and we will use this to notify you about any new documents which are available for you to view online.

#### Email address

Entered email address is not valid, please check and try again.

#### Re-enter email address

If you're still having difficulty, you may want to contact your Adviser as they can send you an email Invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



We carry out basic validation to make sure the email address provided is in the standard format, e.g. the email address has an @ symbol and a dot with additional text after it. Double check the email address to make sure it follows this format: example@email.com



### 2.13 WHAT HAPPENS NEXT?

Once we have confirmed your email address, the next screen will provide information around what will happen next.

You will receive two emails which will allow you to complete your registration. The process is covered below in 2.14 "How do I complete registration?"

If you provided a new email address that we do not hold on our records, you will also be sent an email confirming that we have changed your email address.



#### What happens next

##### Confirmation of your email address

If you have just given us a new email address that we didn't already hold for you, you'll receive an email confirming we've updated your email address on your Prudential ISA. No further action is required on the back of this email.

##### Completing the registration process

We've also sent you a further two emails to your email address. You'll need to access these to complete the registration process.

- 1 The first email will contain a unique link to the new website.
- 2 The second email will contain your temporary password.

You'll then be taken through the remainder of the registration process where you'll set a password and a memorable word which you'll then use, along with your email address, each time you log in to your online account.

Upon completion of your registration you will need to confirm your bank account details. If you are unable to provide them upon registration you can still access your online dashboard using the To dashboard button.

Please be aware that until you confirm your bank account details you will be asked to confirm them each time you log into your online dashboard.

##### Having issues finding these emails?

If you don't see these emails in your inbox, check your Junk/Spam folder in case your email provider has classified the emails as spam.

If you're still having difficulty, you may want to contact your Adviser as they can send you an email invite to register using their online access, or you can contact our Customer Services Team on 0344 335 8936 (Monday to Friday, 8:30am – 5:30pm, excluding bank holidays).

Need help using the online service? [View our online guide](#)



### 2.14 HOW DO I COMPLETE REGISTRATION?

You will receive two emails:

- The first email will contain a link (an example of which is shown below):

You have recently registered for, or have been invited to register for, a Prudential ISA Online Services account.

To complete the registration, please follow the one-time link below.

<https://pruisa.waystone.com/auth/one-time-login/example@waystone.com>

Your one-time password will follow in a separate email.

If you have any questions, please contact our customer service team on 0344 335 8936 or go to the contact us section of the Prudential ISA Online Services. The line is open Monday to Friday 8:30 am to 5:30 pm, excluding bank holidays.

**This is an automatically generated email. Please do not reply to this email.**

- The second will include a unique password, which you will need to confirm your account.

You should have received a separate email with a link to follow.

Your temporary password is: >41<4K%1WQ

If you have not requested a change to your account, please contact our customer service team on 0344 335 8936 or go to the contact us section of the Prudential ISA Online Services. The line is open Monday to Friday 8:30 am to 5:30 pm, excluding bank holidays.

**This is an automatically generated email. Please do not reply to this email.**

Once you have followed the link in the first email there will be a field for you on the webpage to add the temporary password from the second email.



## Welcome to Your Prudential ISA Online Services

### Complete a few simple steps to log in

Please enter the one-time password we sent to you.

If you've not requested a Prudential ISA, or need to talk to us, please don't hesitate to contact our Customer Service team on 0344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays). Alternatively, you can reach us via email at [prudential@waystone.com](mailto:prudential@waystone.com)

Password (You can paste the copied password)

[Show](#)

Next



You can then go on and complete the following steps:

- Create a new password



## Welcome to Your Prudential ISA Online Services

### Create your password

Your password must be at least 8 characters long, including upper and lower case characters, a number and a special character. Special characters / \ " can't be used in your password.

Password\* [Show](#)

Confirm password\* [Show](#)

Next

If you are having any issues logging in please contact our Customer Service team on 0344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays). Alternatively, you can reach us via email at [prudential@waystone.com](mailto:prudential@waystone.com).



You will receive a confirmation email once this has been successfully updated.

The memorable word linked to your Prudential ISA Online Services log on has been changed as requested.

Please remember that your log on details should never be shared with anyone else.

If you have not requested a change to your account, please contact our customer service team on 0344 335 8936 or go to the contact us section of the Prudential ISA Online Services. The line is open Monday to Friday 8:30 am to 5:30 pm, excluding bank holidays.

**This is an automatically generated email. Please do not reply to this email.**



- Create a memorable word



## Welcome to your Prudential ISA Online Services

### Create your memorable word

It must be at least 8 characters long and only contain A-Z characters.

Memorable word\* [Show](#)

Confirm memorable word\* [Show](#)

Next

If you are having any issues logging in please contact our Customer Service team on 0344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays). Alternatively, you can reach us via email at [prudential@waystone.com](mailto:prudential@waystone.com)



You will receive a confirmation email once this has been successfully updated.

The password linked to your Prudential ISA Online Services log on has been changed as requested.

Please remember that your log on details should never be shared with anyone else.

If you have not requested a change to your account, please contact our customer service team on 0344 335 8936 or go to the contact us section of the Prudential ISA Online Services. The line is open Monday to Friday 8:30 am to 5:30 pm, excluding bank holidays.

**This is an automatically generated email. Please do not reply to this email.**

- Complete verification

You will be asked to provide some personal information. This is so we can be sure we are handling your application securely.



## Welcome to your Prudential ISA Online Services

### Complete a few simple steps to log in

Please enter your date of birth and National Insurance number for verification purposes

If you've not requested a Prudential ISA, or need to talk to us, please don't hesitate to contact our Customer Service team on 0344 335 8936 (Monday to Friday 8:30am-5:30pm, excluding bank holidays). Alternatively, you can reach us via email at [prudential@waystone.com](mailto:prudential@waystone.com).

Need help using the online service? [View our online guide](#)

#### Date of birth

Day / Month / Year  
 /  /

#### National insurance number

☐ I don't have a National Insurance number

Next



- Read and accept our terms of use



## Terms of use

To proceed to your account, you must confirm your acceptance of the [terms of use](#).

### Prudential ISA Online Service Terms of Use

These terms of use ("Terms of Use") will apply to You if You are applying for or accessing the Prudential ISA Online Service. These Terms of Use will apply in addition to any other regulatory or contractual terms applicable to the Prudential ISA Online Service and in addition to your ISA Terms and Conditions.

The following words and expressions have the meanings set out below (unless the context otherwise requires):

"Data Protection Regulations" means the General Data Protection Regulation (EU) 2016/679 and the Data Protection Act 2018, together with any applicable laws and regulations relating to the processing of personal data and privacy, including where applicable the guidance and codes of practice issued by the Information Commissioner;

"Waystone Financial Investments Limited" or "WFI" or "Us" or "We" means the provider of the Prudential ISA Online platform as the context requires.

"Prudential ISA Online Investor" means You, as an ISA investor who is eligible to use the Prudential ISA Online Service and to whom these Terms of Use are applicable;

"Prudential ISA Online Service Account" means any and all of Your accounts held within or

☐ I have read and agree to the [terms of use](#) and understand my Adviser can act on my behalf.

Accept

This will complete your registration and you should land on your dashboard.



## 3.0 Adviser Invitation

### 3.1 WHAT HAPPENS ONCE MY ADVISER INVITES ME TO REGISTER?

You can contact your adviser directly and they will send you an invitation via email so you can complete registration.

You will need a valid email address and one unique to you. If you have an email address which is used by you and by somebody else, for example your spouse or partner, only one of you will be able to complete registration.

You will follow the same steps as outlined in 2.14 above.

### 3.2 WHAT SHOULD MY PASSWORD BE?

Your password should conform to the following:

- Contain at least one number
- Contain at least one upper and one lower case letter
- Contain at least one special character – the following special characters cannot be used / \ \*
- Be at least 8 characters
- Be at most 20 characters.

### 3.3 WHAT SHOULD MY MEMORABLE WORD BE?

Your memorable word should conform to the following:

- Contain only A-Z characters – this is case sensitive so can be a mixture of upper and lower case
- Be at least 8 characters
- Be at most 45 characters.

### 3.4 REMEMBERING MY MEMORABLE WORD

We have supported many investors with access issues and problems with entering a memorable word are quite common.

Something we recommend to customers who are having difficulty is to write out the memorable word on a piece of paper and number each character like the below. This will help validate if you are mistyping a character. You should ensure this is destroyed once you have gained access to the site.

1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---

M e m o r a b l e

You can always reset your memorable word if you are still having difficulties. There is a separate FAQ available to help you change your memorable word or your password.

### 3.5 I DIDN'T RECEIVE THE EMAILS TO COMPLETE REGISTRATION

If you cannot see any emails, you should firstly check your junk/spam folder, as you may find the emails there.

Alternatively, you can navigate to the Prudential ISA online login page, <https://pruisa.waystone.com/auth/login>, and select the forgotten password link. If you enter your email address, you should receive the emails again to complete your registration.

If you are still having problems, you can call our customer service team on 0344 335 8936.

### 3.6 HOW DO I REGISTER VIA THE ADVISER HAND-OFF JOURNEY?

If your adviser has just submitted an application on your behalf, you will receive a link and temporary password to the email address we hold on our records.

Once you have accessed the information and completed any actions, you will see a link at the end of this journey that will allow you to register, as demonstrated by the below screen shot.

## Register for online access

You'll need to register online to access documents and information on your ISA.

[Register now](#)

---

## Contact

If you need to speak to your financial adviser about anything in the application, contact:

If you are already registered the register button will show as 'log in now', as demonstrated below.

## Log in to your Prudential ISA Online Services Account

You can use the button below to access documents and information on your ISA.

[Log in now](#)

---

We'll then show you the steps you need to complete to register.



## Complete your registration

### You can register in three simple steps.

We've sent you two emails to register. One containing a link and one containing a temporary password. Follow these instructions to create your digital account:

- 1 Check your e-mail because we've sent you two e-mails, one with a one time link and one with a temporary password.
- 2 Click the one time link then when prompted, enter your temporary password.
- 3 Choose a new password and memorable word, these will be what you use to log into the portal in future.
- 4 Login to your account where you can view your documents, account balance and transaction history.

We strongly suggest that you close your browser before continuing.

---

This will follow the same steps and process as outlined in section 3.1 "What happens once my adviser invites me to register?"

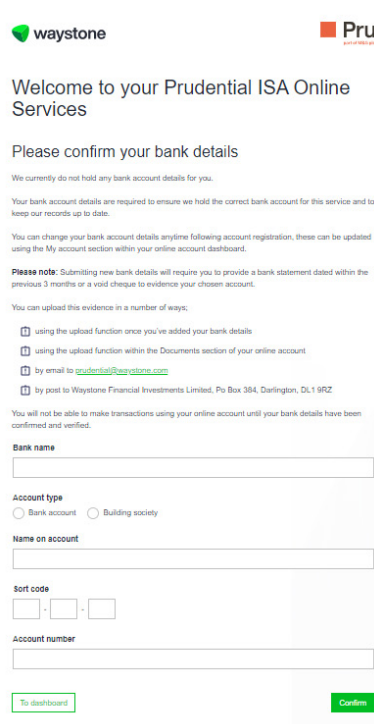
## 4.0 Enhanced Registration feature

### 4.1 WHAT IS THIS?

We have enhanced the registration process to check upfront whether you have bank details linked to your account.

Once you have completed registration via one of the three routes detailed above, Pru Digital will carry out a check against your ISA account.

Where we do not hold your bank details, the next screen will prompt you to provide your bank details. The details must relate to a UK bank account in which you are named, not a third party.



**waystone** **Pru**

Welcome to your Prudential ISA Online Services

Please confirm your bank details

We currently do not hold any bank account details for you.

Your bank account details are required to ensure we hold the correct bank account for this service and to keep our records up to date.

You can change your bank account details anytime following account registration, these can be updated using the My account section within your online account dashboard.

**Please note:** Submitting new bank details will require you to provide a bank statement dated within the previous 3 months or a void cheque to evidence your chosen account.

You can upload this evidence in a number of ways;

- ☐ using the upload function once you've added your bank details
- ☐ using the upload function within the Documents section of your online account
- ☐ by email to [prudential@waystone.com](mailto:prudential@waystone.com)
- ☐ by post to Waystone Financial Investments Limited, Po Box 384, Darlington, DL1 9RZ

You will not be able to make transactions using your online account until your bank details have been confirmed and verified.

**Bank name**

**Account type**

☐ Bank account ☐ Building society

**Name on account**

**Sort code**

**Account number**

[To dashboard](#) [Confirm](#)





After you have input your bank details, the next screen will ask for relevant evidence for us to verify your details. The evidence you can provide is either a bank statement dated within the last three months or a void cheque.



## Welcome to your Prudential ISA Online Services

### Please upload your bank account evidence

As you've added new bank account details, you'll need to provide appropriate evidence so that we can verify your bank account details.

Please note the following in respect of bank account evidence:

- ☐ we can only pay to a UK bank account in which you are named, we can't pay to a third party
- ☐ we'll accept a bank statement dated within the last three months or a void cheque

It's important you provide this evidence as it may delay any transactions you make using your online account. You can provide this evidence by uploading it using the 'Upload document' facility below.

If you're having any difficulty uploading your evidence, you can contact us to discuss alternative ways of verifying your bank account. You can reach our Customer Service team via email at [prudential@waystone.com](mailto:prudential@waystone.com). You can also call on 0344 335 8936 (Monday to Friday 8.30am-5.30pm, excluding bank holidays).

[Upload document](#)

[To dashboard](#)

If you are still having difficulty call your Adviser to invite you or contact our customer services team on 0344 335 8936 (Monday to Friday, 8.30am – 5.30pm, excluding bank holidays).



## Welcome to your Prudential ISA Online Services

### Please upload your bank account evidence

As you've added new bank account details, you'll need to provide appropriate evidence so that we can verify your bank account details.

Please note the following in respect of bank account evidence:

- ☐ we can only pay to a UK bank account in which you are named, we can't pay to a third party
- ☐ we'll accept a bank statement dated within the last three months or a void cheque

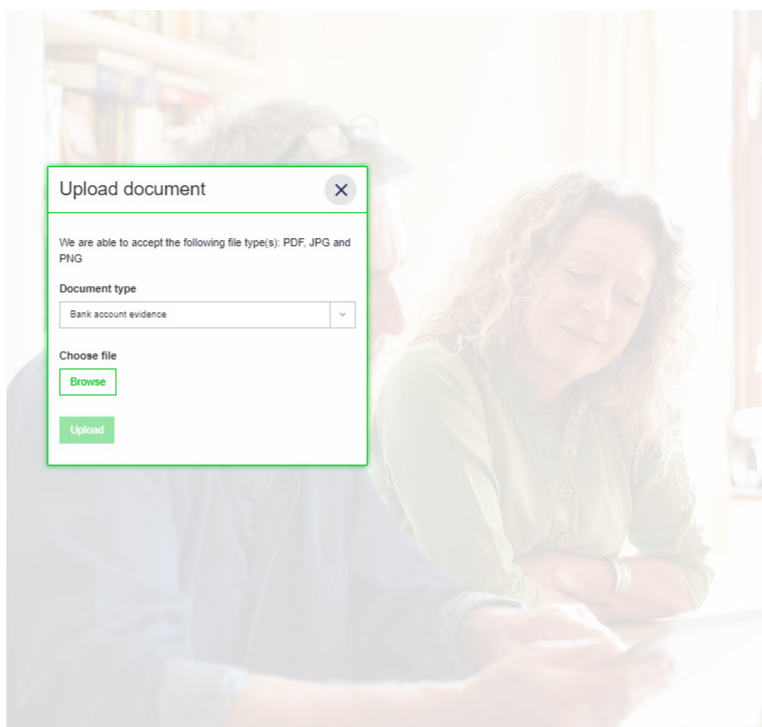
It's important you provide this evidence as it may delay any transactions you make using your online account. You can provide this evidence by uploading it using the 'Upload document' facility below.

If you're having any difficulty uploading your evidence, you can contact us to discuss alternative ways of verifying your bank account. You can reach our Customer Service team via email at [prudential@waystone.com](mailto:prudential@waystone.com). You can also call on 0344 335 8936 (Monday to Friday 8.30am-5.30pm, excluding bank holidays).

[Upload document](#)

[To dashboard](#)

If you are still having difficulty call your Adviser to invite you or contact our customer services team on 0344 335 8936 (Monday to Friday, 8.30am – 5.30pm, excluding bank holidays).



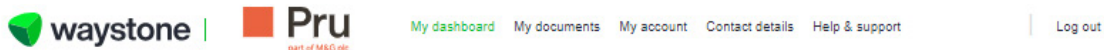
#### 4.2 WHY ARE YOU ASKING ME FOR MY BANK DETAILS?

We want to verify and validate all required details upfront so it will not delay the withdrawal of funds when required in the future.

#### 4.3 DO I NEED TO PROVIDE MY BANK DETAILS?

It is not mandatory to provide your bank details and can bypass this step by pressing the 'Go to dashboard' button. However, we will display a banner on your dashboard to remind you to add them when ready.

Alternatively, if you have an adviser you can reach out to them and they will be able to add the bank details if you feel more comfortable with this approach.



## Dashboard



Bank account evidence is required to verify your bank account. Any payments for withdrawal transactions will be delayed until evidence is received. Please contact us on [0344 335 8936](tel:0344 335 8936) if you need to discuss this further. You can upload your bank account evidence [here](#).