WOODRUFF FINANCIAL PLANNING

What you need to know about...

Our client log in service

All clients who subscribe to one of our regular services (Gold, Silver, Bronze or Portfolio Management), receive access to their details via a secure connection on our website. This leaflet explains the processes involved, and the features of this service.

What is the client log in service?

This is designed to make it easier for you to keep track of your financial planning needs, and to easily access all your policy records.

The service works a little like running your bank account online. You can log in via a secure website at any time of the day and view your financial plans and policies.

Who benefits from this service?

This service is open to all clients who subscribe to one of our regular services. These include:

Portfolio Management
An annual report on your investments and pensions and provides analysis of your fund performance.

Gold - Financial planning
An annual financial report which focuses on your progress towards your stated goals.

Silver - Annual reviews
An annual meeting, to review your financial situation.

Bronze - Maintenance of accounts
General maintenance of your financial records.

Please see the separate leaflets on these services for further information.

What do you get from the service?

Once you sign up to one of our regular services you will be sent a User Name and Password. Details of how to log on to the service will be provided with this information.

Once you log in for the first time you will be prompted to change your password to something more memorable to you.

Once you have signed in you will have access to the following services:

Policy valuations
These will be regularly updated so that you can easily see how well your plans are performing.

Fund factsheets and performance
Where appropriate you can click on fund information to get up to date factsheets on your funds. This also allows you to see how well your funds have performed.

Contract details
You can see at a glance all the policies for which we hold records. This gives you the convenience of being able to easily track your financial products, and includes details such as the amount of cover and policy numbers.

Continued overleaf...

Call today for independent financial advice on this or any other issue on
01206 266882 or email **advice@woodruff-fp.co.uk**

Updating your records
To be able to give you the best advice for your situation we need to keep up to date records on your financial situation. Of course, we can do this in person with you, but this service also allows for you to review the information that we hold on you, and to update this where it has become out of date.

For example, this might include changes to your financial situation such as your income and expenditure. Use of this service can help us to save time (and save you costs) at reviews.

Request reviews
You can also request reviews of a general nature, or more specific to policies.

Analysis of needs
You can select from a number of planners to analyse your financial situation.

What is the cost of this service?
The service is free to clients who sign up to our regular services.

Clients on the Basic package, offering one-off transactional advice, do not get access to this service. Our regular services start from just £10 per month.

How do I log on to this service?
You can access this service via the log in button on our website.

To go straight to the log in area go to:
www.woodruff-fp.co.uk/login.htm

You can also see a demonstration of the service on this page.

Why use us?
1. **Free** initial consultation
2. **Guaranteed** satisfaction with our advice
3. **Fee-based** - no commission hungry salesmen
4. **Fully independent** from insurance companies
5. State of the art **research tools**
6. Regular contact & **services to suit you**

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Woodruff Financial Planning is Authorised and Regulated by the Financial Services Authority.