



ST. JAMES'S PLACE
WEALTH MANAGEMENT



ONLINE WEALTH ACCOUNT: CLIENT GUIDE

PARTNERS IN MANAGING YOUR WEALTH

This document highlights the key Online Wealth Account functionality and the process of registering for Online Services with an activation code, enabling you to access Online Services immediately.

You can contact your St. James's Place Partner if you do not have an activation code, as this can be generated and given to you over the phone. You may already have received an activation code in correspondence from St. James's Place, such as your Quarterly Valuation Statement, please be advised that activation codes are only valid for a limited time.

The Online Wealth Account enables access to a range of services online.

Current capability includes the ability to:

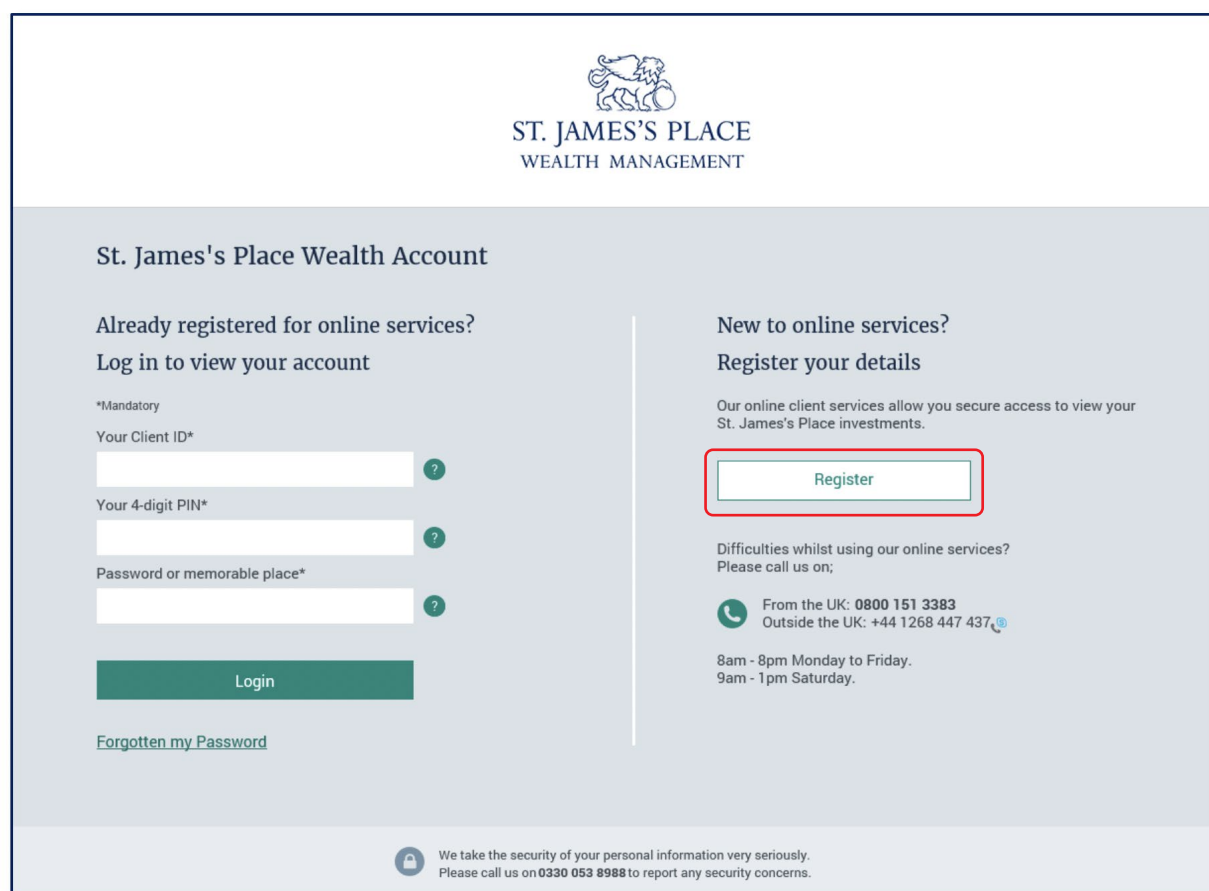
- Use your debit card to make payments to St. James's Place.
- Top up your ISA with your debit card at a time that suits you.
- View the value of your investments in a range of currencies and see a breakdown of that valuation.
- Access SJP Insights for the latest investment news.
- Receive electronic correspondence and update your preferences. *(By registering for electronic correspondence, you will be helping us to reduce our environmental impact).*

HOW TO REGISTER FOR ONLINE SERVICES

Step 1. Visit the login page of the St. James's Place Online Wealth Account <https://clients.sjp.co.uk/>.

Please note, the site is currently not optimised for mobile devices, but works on tablets, laptops and desktops.

Step 2. Select the 'Register' button which is highlighted below (Figure A).



ST. JAMES'S PLACE
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St. James's Place Wealth Account

Already registered for online services?
Log in to view your account

*Mandatory

Your Client ID*

Your 4-digit PIN*

Password or memorable place*

Login

[Forgotten my Password](#)

New to online services?
Register your details

Our online client services allow you secure access to view your St. James's Place investments.

Register

Difficulties whilst using our online services?
Please call us on;

From the UK: **0800 151 3383**
Outside the UK: **+44 1268 447 437**

8am - 8pm Monday to Friday.
9am - 1pm Saturday.

We take the security of your personal information very seriously.
Please call us on **0330 053 8988** to report any security concerns.

Figure A: <https://clients.sjp.co.uk/>

Step 3. Next, choose the 'I have a code' button (Figure B).

The screenshot shows the St. James's Place Wealth Management login page. A modal dialog is open in the center with the title "Do you have an activation code?". The dialog contains the following text: "If you have an activation code you can access your Online Wealth Account in minutes. You will need the activation code and your National Insurance Number." Below this text are two buttons: "I have a code" (highlighted with a red rectangle) and "I don't have a code". The background login form is partially visible, showing fields for Client ID, PIN, and Password, along with a "Login" button and a "Forgotten my Password" link.

Figure B: I have a code

Step 4. When prompted, you should enter your unique Activation code. Next, complete the rest of the form – Surname, National Insurance Number and Email address (Figure C).

The screenshot shows the St. James's Place Wealth Management activation page. A modal dialog is open with the title "Activate your Online Wealth Account". The dialog has a progress bar with three steps: "About you", "Log in details", and "Confirmation". Below the progress bar, it says "We need some information from you to validate your code." The form contains the following fields: "Activation code" (with a hyphen separator), "Surname", "National Insurance Number" (with a question mark icon), and "Email address" (with a question mark icon). At the bottom of the dialog are two buttons: "Close" and "Continue". The background login form is partially visible, showing fields for Client ID, PIN, and Password, along with a "Login" button and a "Forgotten my Password" link.

Figure C: Enter Activation code

Step 5. Finally you will need to setup your Security details. You will be asked to create a Password and 4-digit PIN which you will need to use each time you log in to your Online Services account. This information is important to remember, so choose information that is memorable.

St. James's Place Wealth Management

Activate your Online Wealth Account

About you ✓ Log in details Confirmation

Please provide the password and PIN you would like to use when you log in to your account.

Create password

Between 8 and 25 characters

Confirm password

Create PIN

4 numeric characters

Confirm PIN

Cancel Continue

We take the security of your personal information very seriously.
Please call us on 0330 053 8988 to report any security concerns.

Figure D: Create Password and PIN

Step 6. You are now registered for access to your Online Services account. Please make a note of your Client ID as you will need this to log in (Figure E).

St. James's Place Wealth Management

Activation complete

About you ✓ Log in details ✓ Confirmation ✓

Your Online Wealth Account has been activated.

Your Client ID

SJP001234

Please make a note of your Client ID shown above. You will need it when you log in to view your account, along with the password and PIN you have provided.

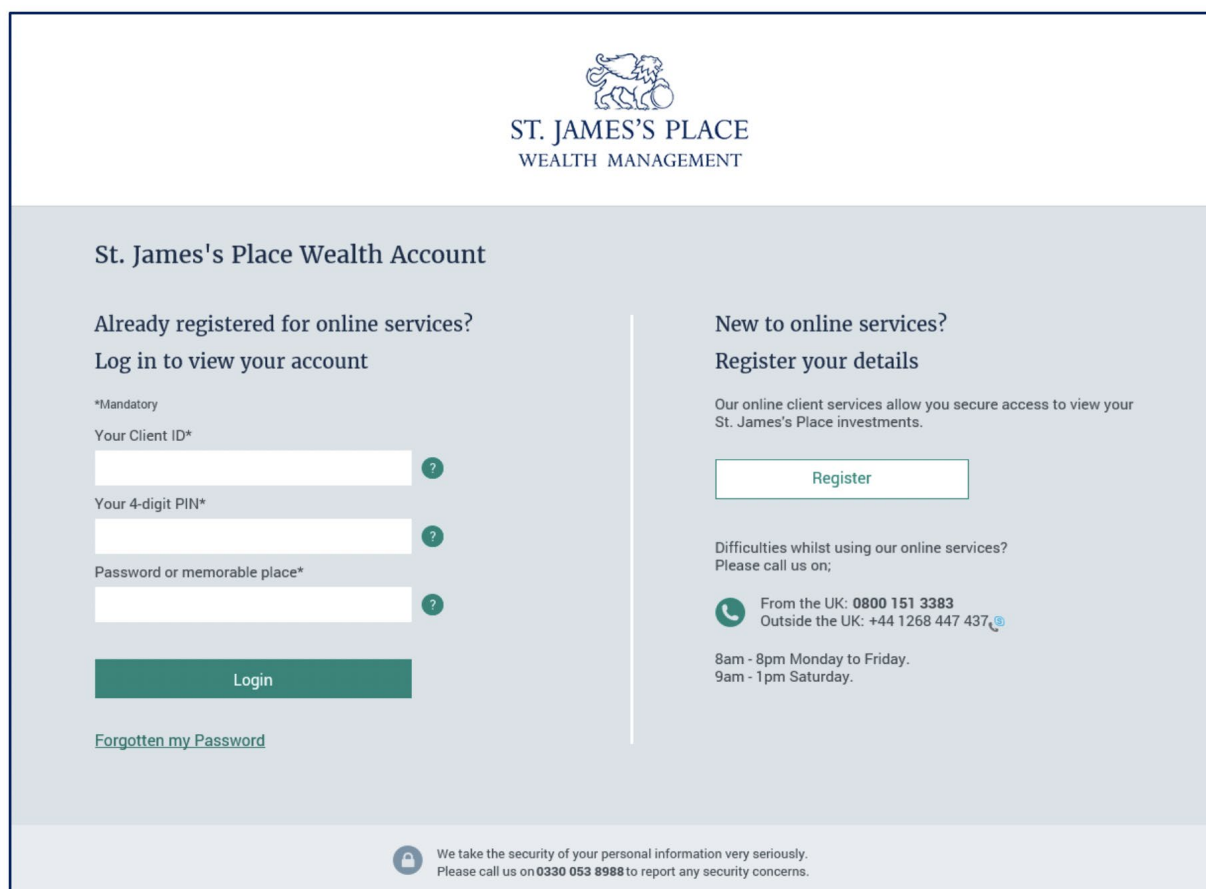
For your convenience we will also send your Client ID to you in an email.

Go to log in

We take the security of your personal information very seriously.
Please call us on 0330 053 8988 to report any security concerns.

Figure E: Create ID

Step 7. Now you are registered you can log in by entering your Client ID, 4-digit PIN and Password.



The screenshot displays the St. James's Place Wealth Account login interface. At the top, the company logo and name are centered. The main content area is divided into two columns. The left column, titled 'St. James's Place Wealth Account', contains a section for 'Already registered for online services?' with a 'Log in to view your account' prompt. Below this are three mandatory input fields: 'Your Client ID*', 'Your 4-digit PIN*', and 'Password or memorable place*', each with a help icon. A green 'Login' button is positioned below these fields, and a link for 'Forgotten my Password' is at the bottom of the section. The right column, titled 'New to online services?', features a 'Register your details' prompt. It includes a brief description of online services, a 'Register' button, and contact information for difficulties, including phone numbers for the UK and outside the UK, and operating hours. A security notice at the bottom of the page states that personal information is taken seriously and provides a contact number for security concerns.

St. James's Place Wealth Account

Already registered for online services?
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*Mandatory

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[Login](#)


[Forgotten my Password](#)

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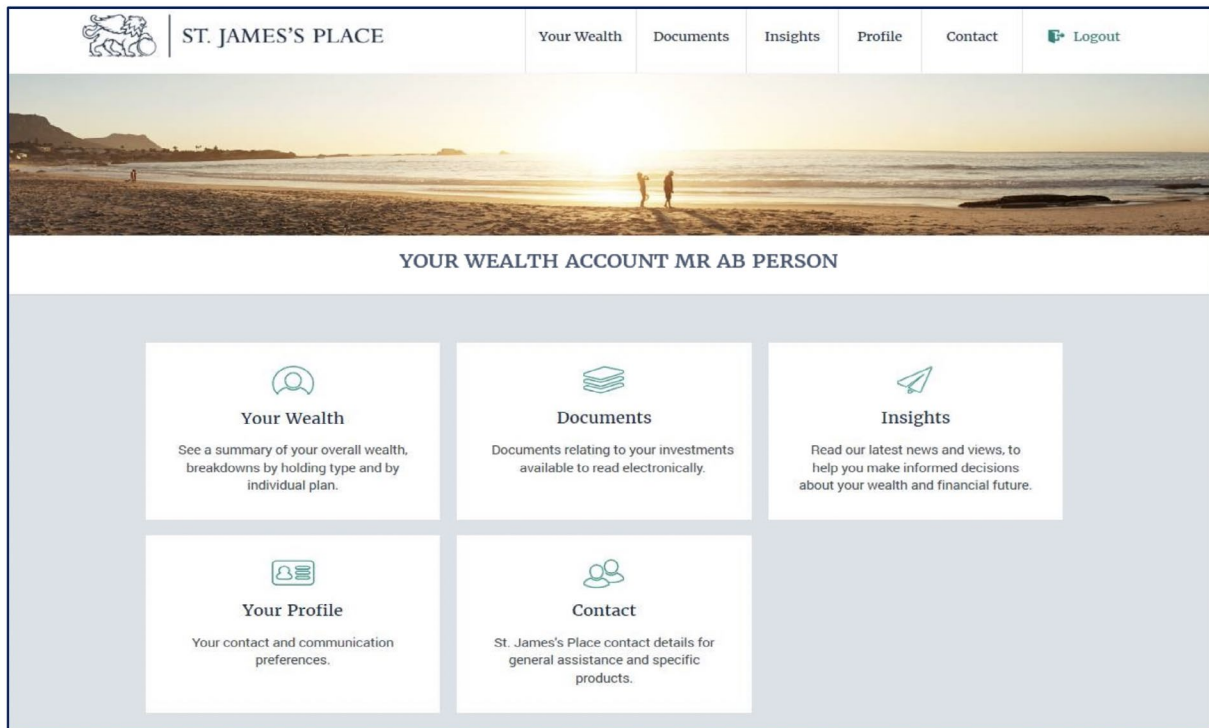
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Figure F: Login screen

Please note you can register without an activation code. In this instance, an online form will need to be completed. Once the details have been processed and verified a Client ID will be posted to you.

WITHIN YOUR ONLINE WEALTH ACCOUNT

Once you have logged into your Online Wealth Account, you will be presented with the following homepage.

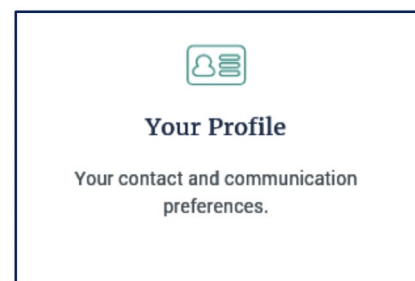


UPDATING YOUR CONTACT AND COMMUNICATION PREFERENCES

By selecting the 'Your Profile' tile you will be able to update your contact and communication preferences. Alternatively you can click the 'Profile' tab from the menu at the top of your Online Wealth Account homepage.

You can set your preferences for receiving regular reports and correspondence. **By setting your correspondence to online, you will be helping us to reduce our carbon footprint.**

For correspondence, an option is available to receive notifications via email or text. This will notify you when a new piece of correspondence is available in the 'Document library' as detailed below.



Receive regular reports	<input type="radio"/> Post	<input checked="" type="radio"/> Online only	Regular reports are documents such as Annual Wealth Account Report and Retirement Contribution Summary. If you choose 'Online only', you will be notified by email when new reports are available in your document library.
Receive correspondence	<input type="radio"/> Post	<input checked="" type="radio"/> Online	Correspondence includes documents such as acknowledgement and confirmation letters. If you choose 'Online', you will be notified using your preference when new correspondence is available in your document library.
Correspondence notification preference	<input checked="" type="radio"/> Email	<input type="radio"/> Text	We will notify you via your preference when a new piece of correspondence is available in your 'Document library'.
			Cancel Save preferences

DOCUMENTS AND CORRESPONDENCE AVAILABLE

If you have opted to receive an electronic version of certain documents, as detailed above, they will display within the 'Documents' tile.

Having now set your preferences to online, you will receive the majority of correspondence about your St. James's Place Pensions, Unit Trusts, ISAs and Onshore Bonds electronically.

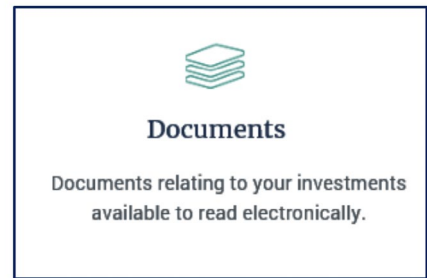
Other online documents available include:

- Annual Wealth Account.
- Investment Management Approach mailing.
- Quarterly Valuation Statements.
- Regular income and withdrawal statements.
- Regular contribution summaries.

There are some items of correspondence which will continue to be sent in the post, these include:

- Letters with additional enclosures such as terms & conditions, reply-paid envelopes, cheques and return of original documentation.
- Change of address letters, which are sent by post for security purposes.
- Correspondence in respect of International Investment Bonds and other St. James's Place International plans.

If you need further help with any of these features, please contact our Administration Centre on 0800 151 3383.





ST. JAMES'S PLACE
WEALTH MANAGEMENT

The 'St. James's Place Partnership' and the titles 'Partner' and 'Partner Practice' are marketing terms used to describe St. James's Place representatives. Members of the St. James's Place Partnership in the UK represent St. James's Place Wealth Management plc, which is authorised and regulated by the Financial Conduct Authority. St. James's Place Wealth Management plc Registered Office: St. James's Place House, 1 Tetbury Road, Cirencester, Gloucestershire, GL7 1FP, United Kingdom. Registered in England Number 4113955.