

# ACCESSING MY FUTURE



It is easy to start using My Future, all you need to do is contact your 7IM Relationship Manager on 020 7760 8777 and ask for the My Future functionality to be turned on for your firm.

You do not need to have access to the 7IM Platform to use My Future. We'll need to capture some details about you and your firm (if we don't have them already) to enable access and for us to capture the relationship you have with the client.

## Creating plans for your clients

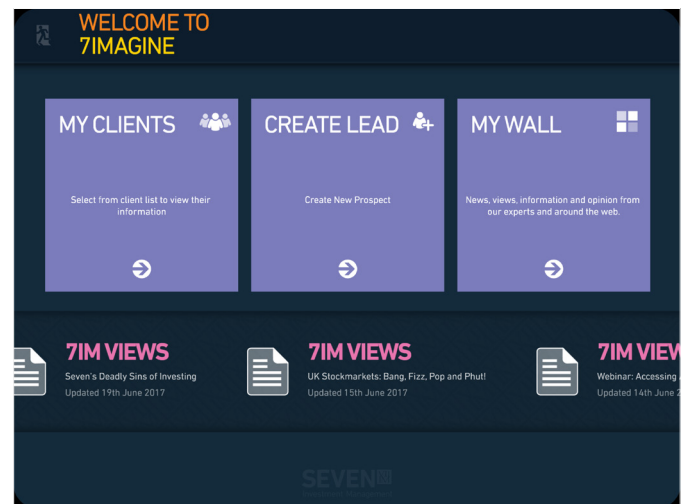
- 1 Download 7IMagine from the Apple or Google Play store on your tablet device. A Windows desktop and Surface version is also available (Windows 10) from the Microsoft store.



- 2 Select 'Login to 7IMagine' and login using your 7IM login details.



- 3 Either select 'My Clients' to create a plan for an existing client or 'Create Lead' to set up a new client and create a plan for them.



- 4 If creating a new client capture the client's details and register.



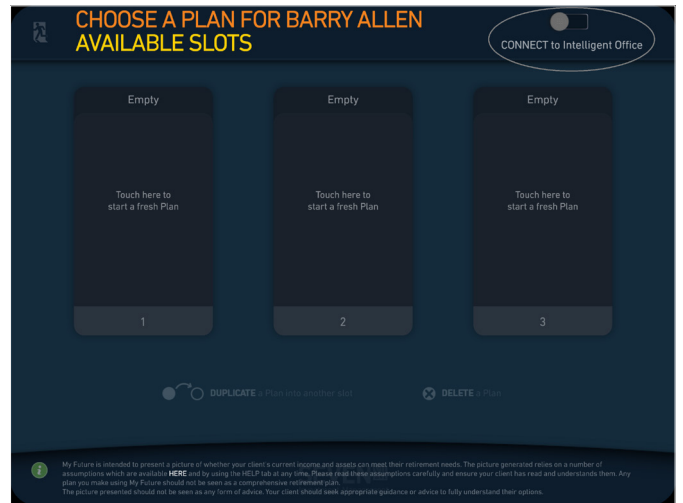
- 5 If creating a plan for an existing client select them from the client rolodex.



**6** Now that you have accessed / set up a new client, you can create a plan for them.

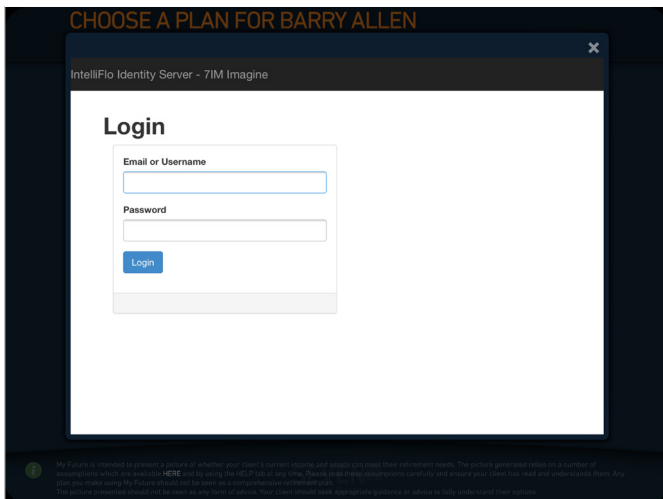


**7** Choose a slot and create the plan. If you use Intelligent Office you can pull through the client information you already have captured, slide the CONNECT this client to Intelligent office. If not skip to step 8.

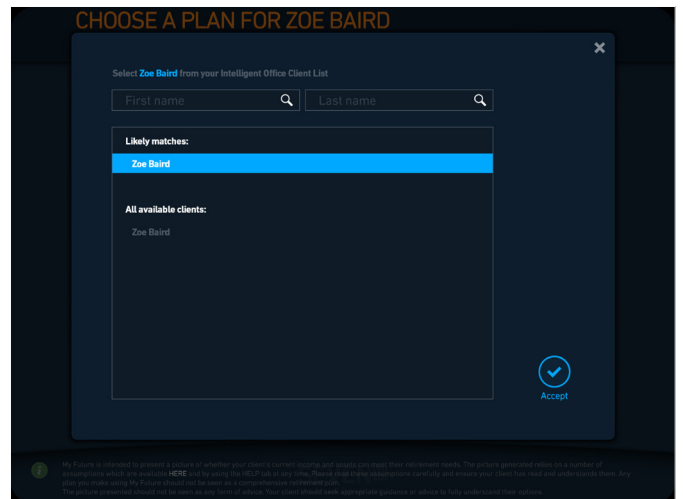


## Linking My Future with Intelligent Office

**7a** Enter your login details.



**7b** Choose the relevant client from the client list, a suggestion is provided based on the name of the client.



**7c** Review and update where necessary any of the details that have been populated.



**7d** Complete the rest of the information and move onto step 8 on the next page.

### KEY INFORMATION

- Not all information in Intelligent Office is provided to My Future, e.g. growth rates, so make sure you check all the information and update it accordingly or add any additional information.
- Any information provided by Intelligent Office will be displayed in blue.
- If retrieving a saved plan that contains information from Intelligent Office you will have the choice whether you wish to update the information or not.
- If you have any issues or wish to discuss this functionality in more detail please contact your 7IM Relationship Manager.



