

# Login safely and securely

A guide to our client portal login

Succeeding together



# Contents

**Protecting you online** **02**

**New to 7IM's online services** **03**

- 03 Register to view your own investments 03
- 02 Register to view investments on behalf of a  
Trustee or Power of Attorney 04

**Setting up two-factor authentication** **05**

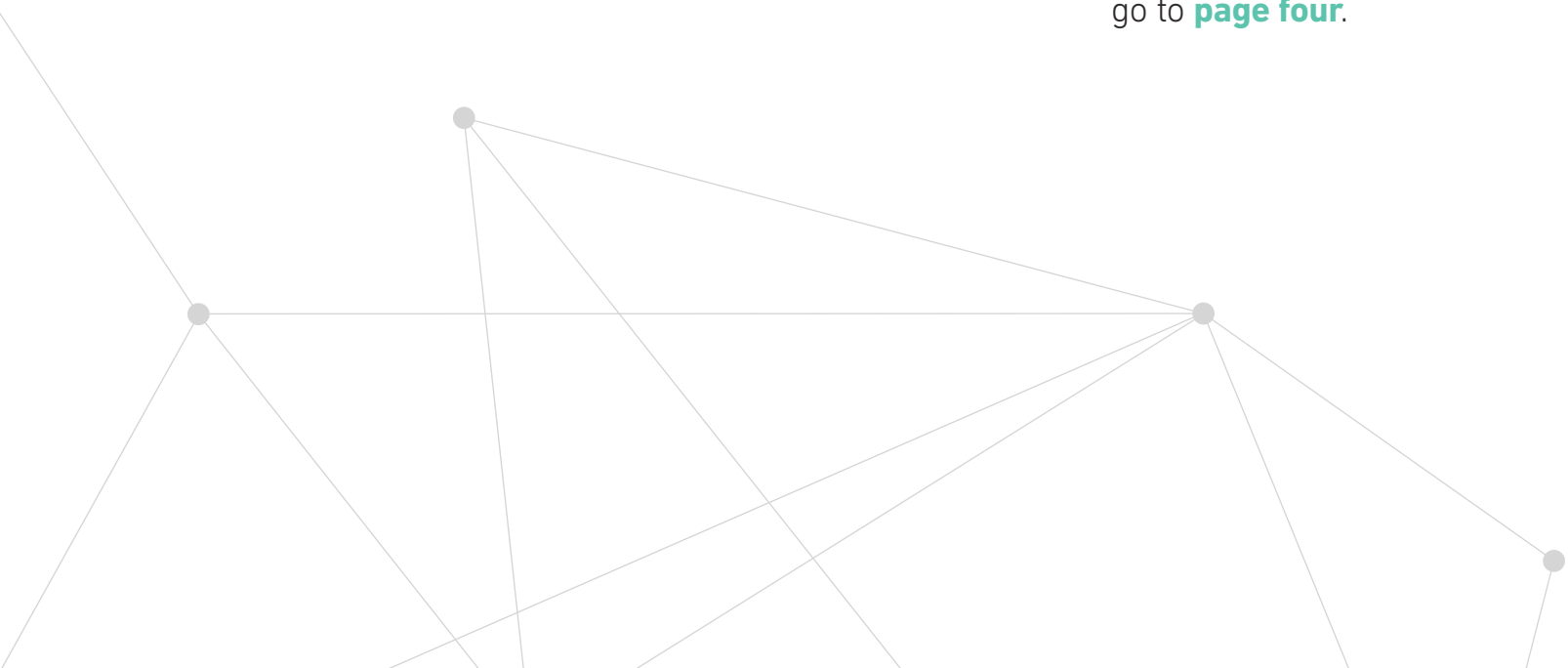
# Protecting you online

We ensure your personal and investment data is safe using our two factor authentication login process.

If you need help accessing your account, our helpful guide is here to help you through the process.

If you are new to 7IM's online services and wish to view your own investments go to **page three**.

If you are new to 7IM's online services and wish to view investments held on behalf of a trustee or power of attorney go to **page four**.



# Accessing your online service

## Register to view your own investments

1

Login

Username

Password

Forgotten password? | Reset access

Login

New to viewing your account online? [Register](#)

On the '**Login**' screen, click on the '**Register**' link.

2

Information on [how to register](#).

Select an option to continue

☒ I would like to view my own investments

☐ I would like to view investments held on behalf of a:

- Client (if you have Power of Attorney / Court of Protection)
- Corporate entity
- Charity
- Trust

Continue

On the '**Registration**' screen select the option '**I would like to view my own investments**'. If you are linked to other family members you will also be able to see their investments.

3

Last name

Date of birth

DD MM YYYY

National Insurance number

National Insurance number

☐ I do not have a National Insurance number

Email Address

☐ I have read and agree with the [7IM Online service terms](#)

We will process your personal data in accordance with our [Privacy Policy](#)

Submit

At this point, you will need to input the following personal information:

- Your last name
- Your date of birth
- Your National Insurance number or bank details
- Your email address
- Your mobile phone number

Read and tick to confirm the 7IM Online Service terms, then '**Submit**'.

You will now be prompted to set up two-factor authentication. Two-factor authentication is an additional security step, which means a code will be sent to either your email or phone that you need to input each time you login.

## Accessing your online service

### Continued

Before you can register for online access, please ensure you have the reference that was on your '**Welcome Letter**' as you will need to enter that on screen.

### Register to view investments on behalf of a Trustee or Power of Attorney

1

Login

Username

Password

Forgot password? | Reset access

Login

New to viewing your account online? [Register](#)

On the 'Login' screen, click the '**Register**' link.

2

Information on [how to register](#).

Select an option to continue

☐ I would like to view my own investments

☒ I would like to view investments held on behalf of a:

- Client (if you have Power of Attorney / Court of Protection)
- Corporate entity
- Charity
- Trust

Continue

On the '**Registration**' screen, select '**I would like to view the investments on behalf of a:**

- **Client (if you have Power of Attorney/Court of Protection)**
- **Corporate entity**
- **Charity**
- **Trust**

3

Last name

Reference Number

Email Address

☐ I have read and agree with the [7IM Online service terms](#)

We will process your personal data in accordance with our [Privacy Policy](#)

Submit

On the following screen, please enter the following personal information:

- Your last name
- Your reference
- Your email address
- Your mobile phone number

Read and tick to confirm the 7IM Online Service terms, then Submit.

You will now be prompted to set up two-factor authentication. Two-factor authentication is an additional security step, which means a code will be sent to either your email or phone that you need to input each time you log in.

# Setting up two-factor authentication

These steps are to be followed if you are viewing your own investments, or on behalf of a trustee or power of attorney.

**1**

@ Verify your email

We have sent a code to 12345@7im.co.uk ✉

Please enter the verification code

[Didn't receive the code?](#)

**Submit**

Trouble logging in?

Please call the UK based service team.  
Between 09:00 - 17:00 Monday to Friday

☎ 020 7760 8777


On the **'Email verification'** screen, enter the verification code we have sent to your email address. If you do not receive a verification code within a couple of minutes you can request a new code by using the **'Didn't receive the code'** link and 7IM will send you a new code.

**2**

Enter your phone number

For account security, you can add a phone number to your account. We will send a code to it every time you log in to verify your identity.

Mobile phone number

 +44

**Submit**

If you cannot use a mobile number to verify, you may [skip this stage](#)

Enter your mobile number for verification.

Having two methods of communication verified is the most secure way to log in. *However, if you do not wish to verify your mobile number, you may skip this step and move to step 4.*

**3**

📱 Verify your number

We have sent a code to

Enter the 6 digit code

[Didn't receive the code?](#)

**Submit**

Trouble logging in?

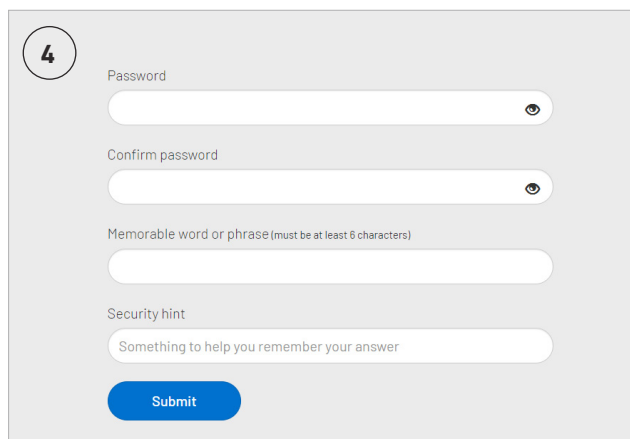
Please call the UK based service team.  
Between 09:00 - 17:00 Monday to Friday

☎ 020 7760 8777

On the second verification screen, enter the verification code we have sent to your mobile phone. If you do not receive a verification code within a couple of minutes you can request a new code by using the **'Didn't receive the code'** link and 7IM will send you a new code.

## Setting up two-factor authentication

### Continued



4

Password

Confirm password

Memorable word or phrase (must be at least 6 characters)

Security hint

Something to help you remember your answer

Submit

Next time you log in your login details will be:

- **Username:** this will be your email address.
- **Password:** this will now be the password you have created in step 4 that is a minimum of 10 characters. You will need to enter all of the characters when logging in.
- **Security code:** a security code will be sent directly to your email address or mobile phone.

On the security details screen you will need to create a password, a memorable word and hint. Your password must contain a minimum of 10 characters and at least 3 of the following:

- a number
- a lowercase letter
- an uppercase letter
- a special character

You have now created your login details.