Standard Life

There's a lot to look forward to

Standard Life Wrap

Getting started with the portal

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Introduction

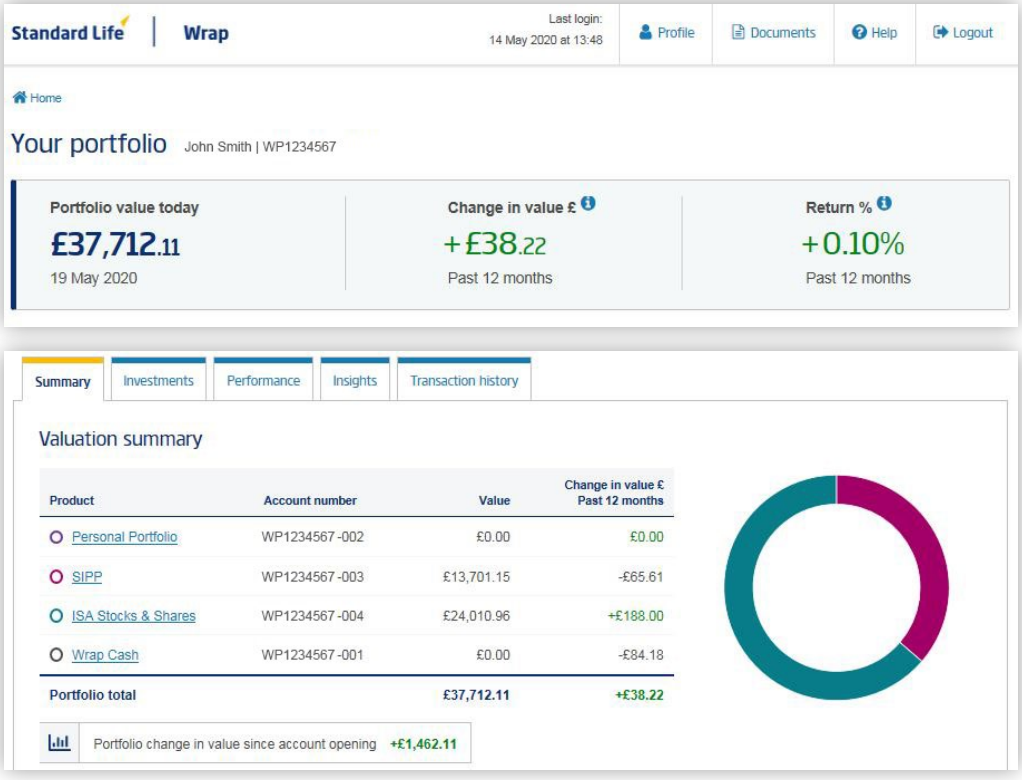
Welcome to the online portal for your Standard Life Wrap account. This guide will take you through how to register for the first time and login, using our security partner Okta. Security is important to us and Okta are a market leader in managing secure online access.

Once registered, you'll be able to log in and view your Wrap account whenever it suits you. You can quickly get hold of the information you need to keep track of your investments.

The value of your investments can go down as well as up, and you could get back less than you paid in.

With the portal you can:

- see a quick summary view of your portfolio
- view up-to-date valuations, product details and documents
- access on your desktop, tablet or mobile
- reset the password and unlock account if needed.



This example is for illustrative purposes only. No assumptions regarding future performance should be made.

"You can quickly get hold of the information you need to keep track of your investments"

Registering for the portal

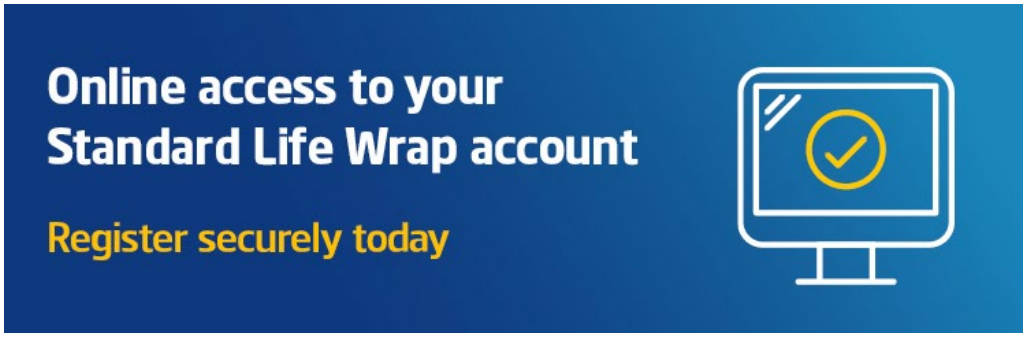
Portal access email

Before logging in for the first time, you will need to register first.

We'll send you an email confirming your access to the portal and explain how to get started.

Once you've received this email, you can register by clicking the link through to our security partner, Okta. This will take you to the Okta website to complete the registration process.

Please note, the registration link is only available for 72 hours after the email is sent. You can request another email if the registration link has expired.



Name, we're pleased to let you know that you can now register securely online to view your Standard Life Wrap account.

We've improved our online services to ensure they meet the latest online security standards and we're now partnering with leading firm, Okta to provide the latest security technology.

Once you register securely through Okta, you can login to view your latest Wrap valuation, investments and plan documents.

But first, we need to get you started:

1. You'll need to register with our security partners Okta by clicking here: Register with Okta
2. Okta will send you an email to verify your email address which completes the registration process.
3. Once you have your Okta identity, please use https://slrebrandsyst.fnz.co.uk to navigate to your login page and select 'Client Login' and save this address for future use.

Having trouble registering?
View our user guide for step-by-step support.

Any questions? This is a genuine email from Standard Life. If you have any questions or concerns you can contact your financial adviser aligned to your Standard Life Wrap account.

Click here if you'd like to find out more about Okta and why we've partnered with them before you register.

Registering for the portal

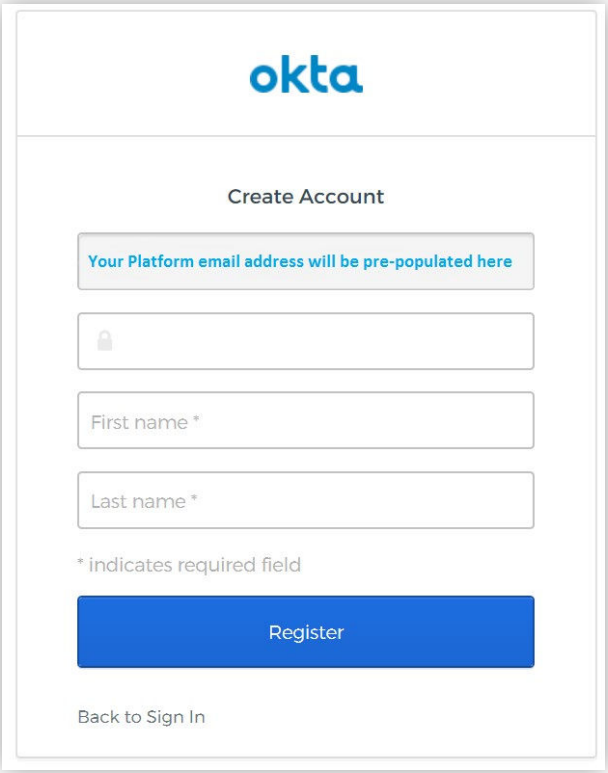
How do I register?

After clicking “Register with Okta” from the Portal Access Email, you will see the registration step.

The email address will pre-populate with the one we already have registered for you and will be part of your login.

Please note, this email has to match the one we hold for security reasons. Your email address can be changed later if required.

Your password must be at least 12 characters long. There are no restrictions on the characters you choose, but we have checks in place to make sure your password is strong. Your password won’t expire and can be changed at any time. Page 9 of this guide explains how to do this.



Logging in to the portal

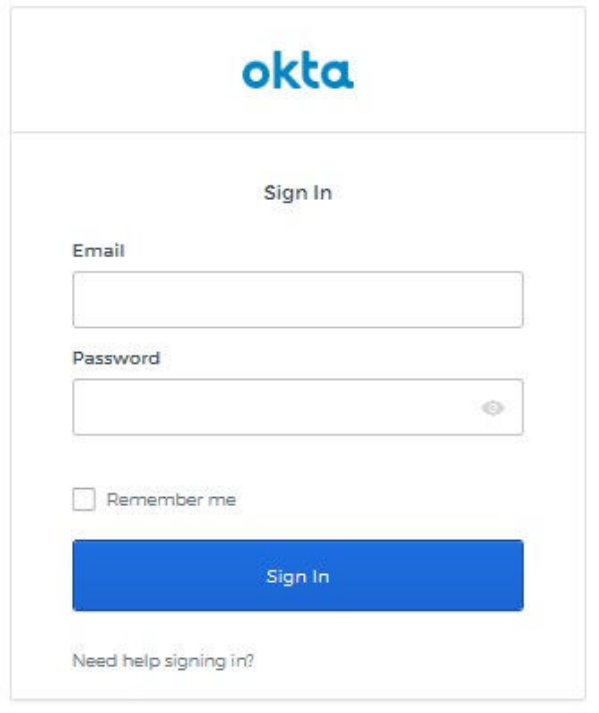
How do I login?

Once you've registered you will receive a verification email. You should click on the link to take you to the next step. This verifies your identity.

Enter your email address and password to enter the portal.

There is a link to get help on this screen if you have forgotten your password.

There is also a facility to unlock your account if you make more than five unsuccessful attempts. You'll receive an email giving you the steps to follow.



Email addresses

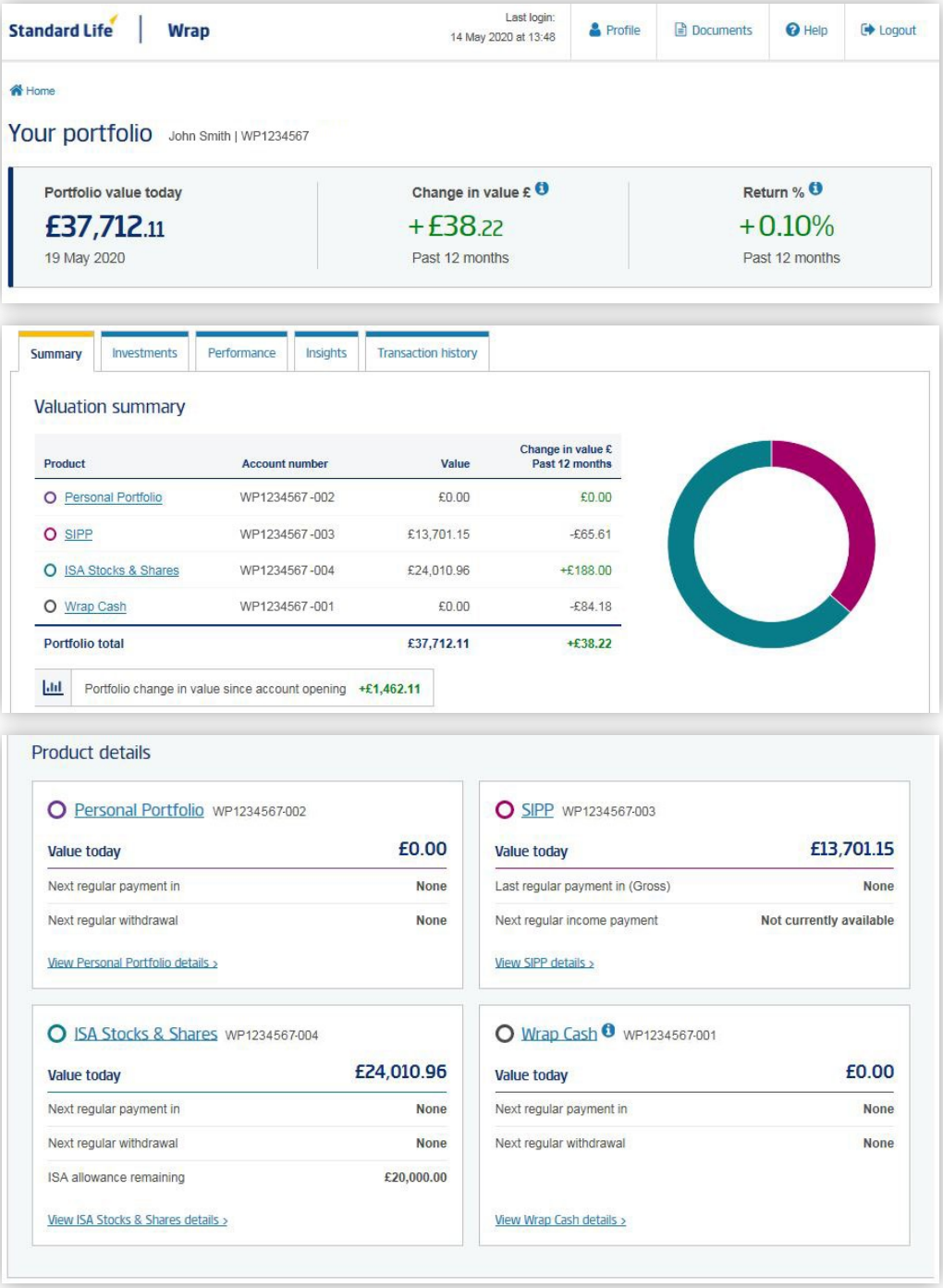
Are there any restrictions on email addresses?

Please enter the email we hold on record for you when you first register for the portal.
This is the email address that we sent your registration email to. You can update your email address later, once you've logged into the portal.

Summary page

What will I see first?

The first screen you will see is a summary view of your portfolio. This shows your total portfolio valuation at today, the change in value (monetary and percentage) over a 12 month period (or from when you first opened the account if earlier) and a breakdown of the products you hold.

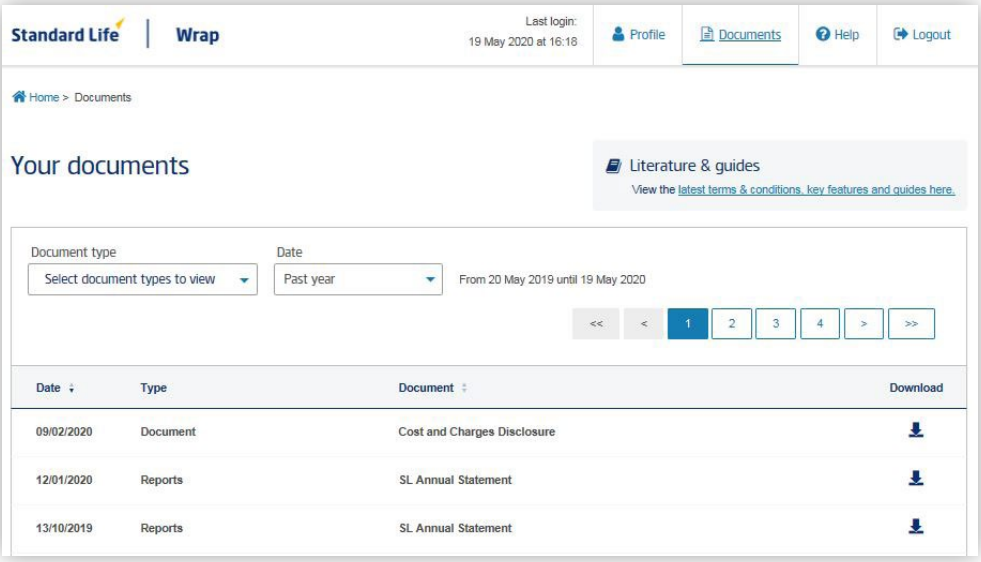


This example is for illustrative purposes only. No assumptions regarding future performance should be made.

Documents

Can I see my documents on the portal?

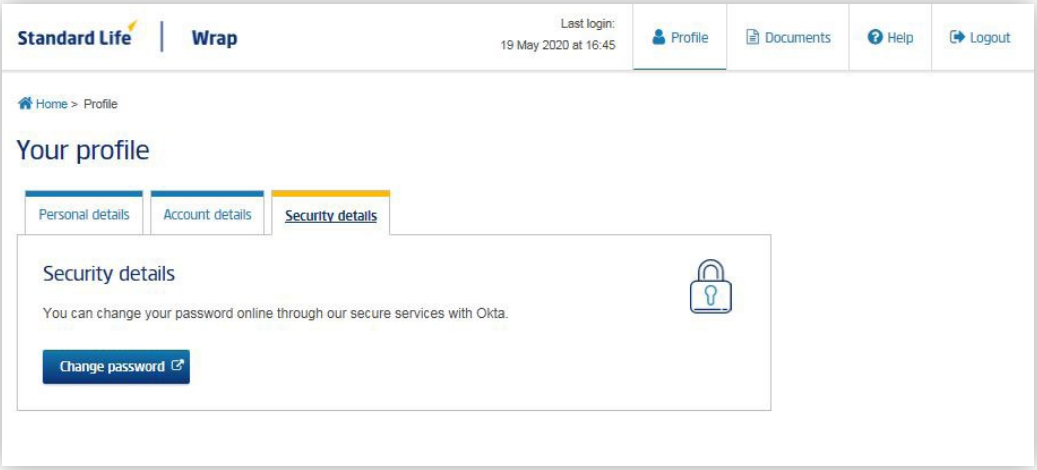
There is a document library on the portal which will store copies of your important Wrap account documents. Just click on ‘Documents’ at the top of the page.



Security details

How do I update my password?

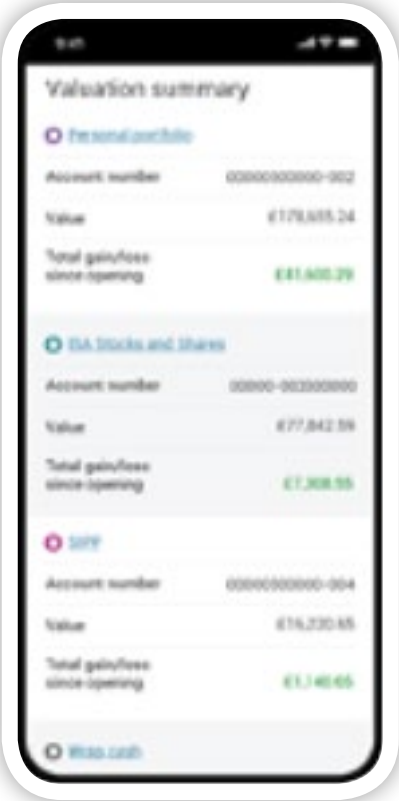
In the Profile area of the portal, there is an option to update your security details.



Mobile view

Can I view the portal on my mobile device or tablet?

The portal is fully mobile responsive. You can login using the internet browser on your device.



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Can I add the portal to my mobile device home screen?

Yes, devices have the option to save the Welcome/login page URL as an icon to provide quick access to the mobile site.

You will be responsible for entering a username and password. It's the device that makes this login easy and allows username/password to be saved on the device and then re-used when the portal requests it. These are normally validated by using the security on the device (e.g. face ID or touch ID).

Further support

If you have any questions or need further support, please contact your adviser firm.

Standard Life Savings Limited, provider of the Wrap Platform, is registered in Scotland (SC180203) at 1George Street, Edinburgh, EH2 2LL.
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