



There's a lot to look forward to

## Standard Life Wrap

Getting started with the portal



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# Introduction

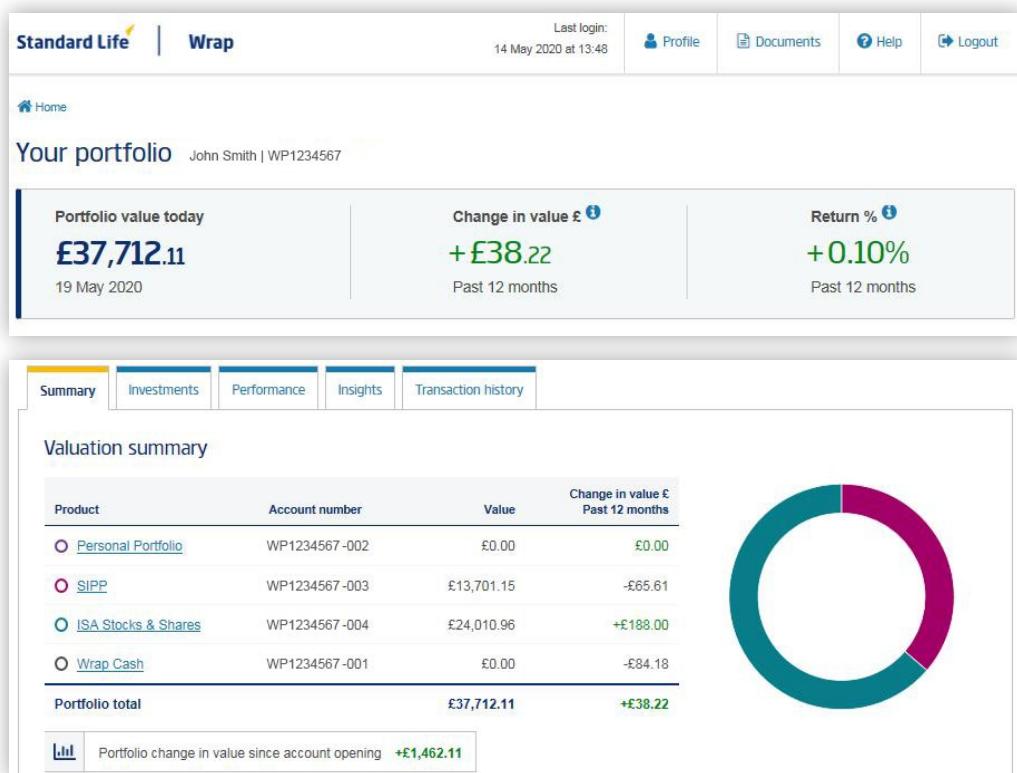
Welcome to the online portal for your Standard Life Wrap account. This guide will take you through how to register for the first time and login, using our security partner Okta. Security is important to us and Okta are a market leader in managing secure online access.

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.



Standard Life | Wrap

Last login: 14 May 2020 at 13:48 | Profile | Documents | Help | Logout

Home

Your portfolio John Smith | WP1234567

Portfolio value today: £37,712.11 (19 May 2020)

Change in value £: +£38.22 (Past 12 months)

Return %: +0.10% (Past 12 months)

Summary Investments Performance Insights Transaction history

Valuation summary

Product	Account number	Value	Change in value £ Past 12 months
Personal Portfolio	WP1234567-002	£0.00	£0.00
SIPP	WP1234567-003	£13,701.15	-£65.61
ISA Stocks & Shares	WP1234567-004	£24,010.96	+£188.00
Wrap Cash	WP1234567-001	£0.00	-£84.18
Portfolio total		£37,712.11	+£38.22

Portfolio change in value since account opening +£1,462.11

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

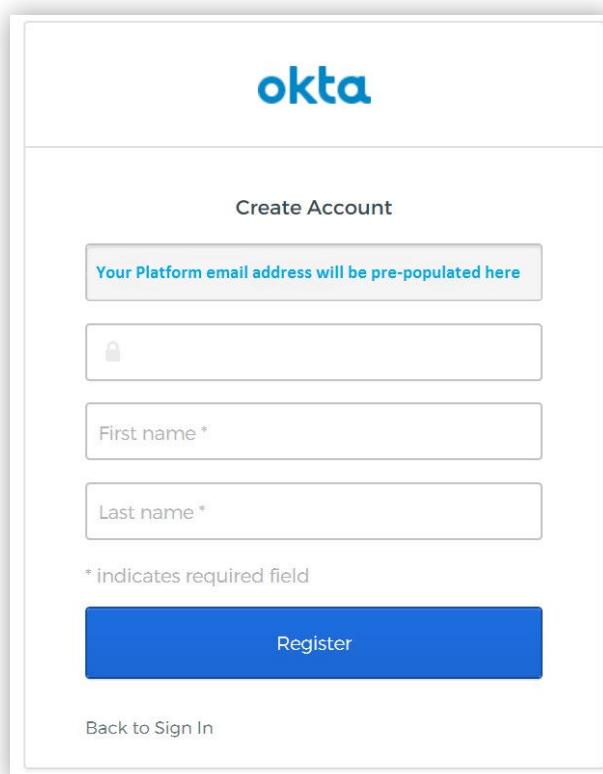
## How do I register?

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.



The image shows a screenshot of the Okta Create Account registration form. The form is titled "Create Account" and features a "Your Platform email address will be pre-populated here" field. Below this are fields for "First name \*" and "Last name \*". A note at the bottom left states "\* indicates required field". A large blue "Register" button is at the bottom, and a "Back to Sign In" link is at the bottom left of the form area.

# Logging in to the portal

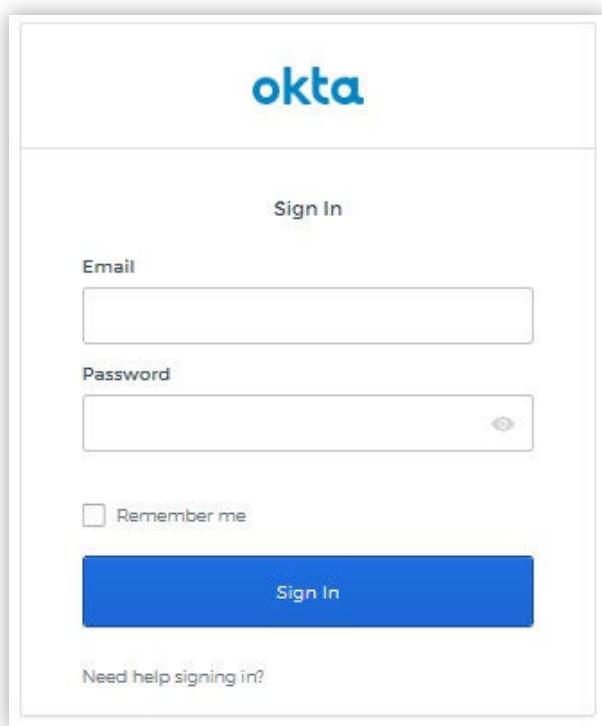
## How do I login?

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.



The image shows a screenshot of a web-based sign-in form. At the top, the word "okta" is displayed in a blue, lowercase, sans-serif font. Below this, a horizontal line separates the header from the main form area. In the center of the form is a "Sign In" button with a thin blue border and white text. To the left of the "Sign In" button are two input fields: the top one is labeled "Email" and the bottom one is labeled "Password". Both fields contain placeholder text. Below the "Email" field is a "Remember me" checkbox. At the bottom of the form is a large blue "Sign In" button with white text. At the very bottom of the page, there is a small, centered link that says "Need help signing in?".

## 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.

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Last login: 14 May 2020 at 13:48 | [Profile](#) | [Documents](#) | [Help](#) | [Logout](#)

 Home

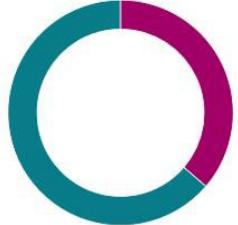
Your portfolio John Smith | WP1234567

Portfolio value today <b>£37,712.11</b> 19 May 2020	Change in value £ <b>+£38.22</b> Past 12 months	Return % <b>+0.10%</b> Past 12 months
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[Summary](#) [Investments](#) [Performance](#) [Insights](#) [Transaction history](#)

**Valuation summary**

Product	Account number	Value	Change in value £ Past 12 months
<a href="#">Personal Portfolio</a>	WP1234567-002	£0.00	£0.00
<a href="#">SIPP</a>	WP1234567-003	£13,701.15	-£65.61
<a href="#">ISA Stocks &amp; Shares</a>	WP1234567-004	£24,010.96	+£188.00
<a href="#">Wrap Cash</a>	WP1234567-001	£0.00	-£84.18
<b>Portfolio total</b>		<b>£37,712.11</b>	<b>+£38.22</b>



 Portfolio change in value since account opening **+£1,462.11**

**Product details**

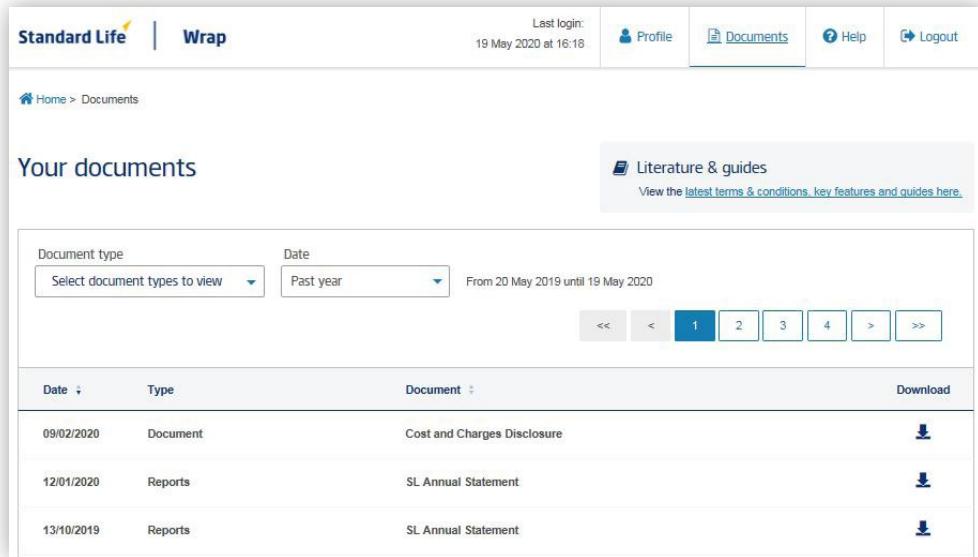
<p><a href="#">Personal Portfolio</a> WP1234567-002</p> <p><b>Value today</b> <b>£0.00</b></p> <p>Next regular payment in None</p> <p>Next regular withdrawal None</p> <p><a href="#">View Personal Portfolio details &gt;</a></p>	<p><a href="#">SIPP</a> WP1234567-003</p> <p><b>Value today</b> <b>£13,701.15</b></p> <p>Last regular payment in (Gross) None</p> <p>Next regular income payment Not currently available</p> <p><a href="#">View SIPP details &gt;</a></p>
<p><a href="#">ISA Stocks &amp; Shares</a> WP1234567-004</p> <p><b>Value today</b> <b>£24,010.96</b></p> <p>Next regular payment in None</p> <p>Next regular withdrawal None</p> <p>ISA allowance remaining £20,000.00</p> <p><a href="#">View ISA Stocks &amp; Shares details &gt;</a></p>	<p><a href="#">Wrap Cash</a> WP1234567-001</p> <p><b>Value today</b> <b>£0.00</b></p> <p>Next regular payment in None</p> <p>Next regular withdrawal None</p> <p><a href="#">View Wrap Cash details &gt;</a></p>

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.



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Last login:  
19 May 2020 at 16:18

Profile Documents Help Logout

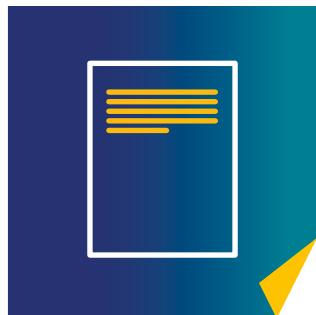
Home > Documents

### Your documents

Literature & guides

View the [latest terms & conditions, key features and guides here](#).

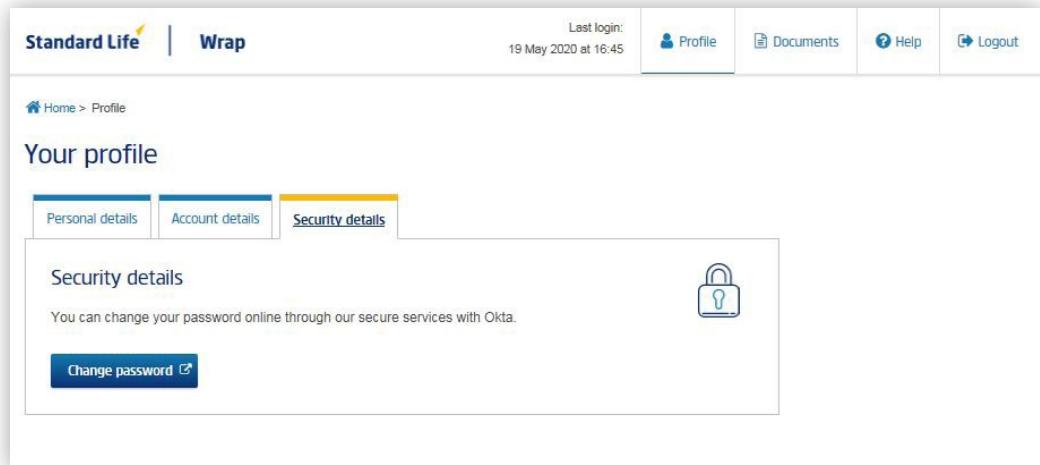
Date	Type	Document	Download
09/02/2020	Document	Cost and Charges Disclosure	
12/01/2020	Reports	SL Annual Statement	
13/10/2019	Reports	SL Annual Statement	



# Security details

## How do I update my password?

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

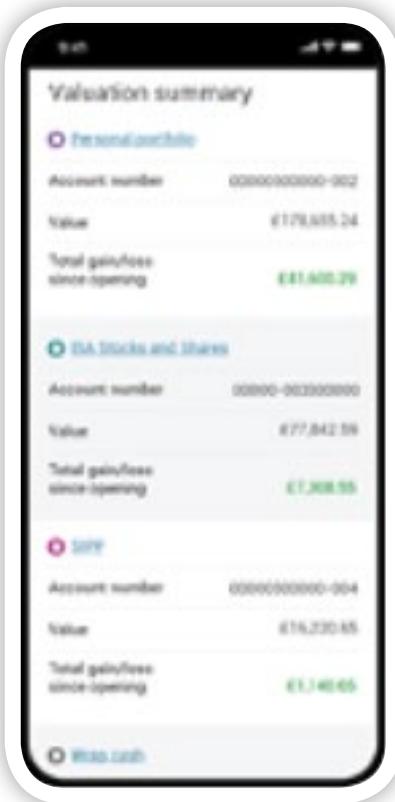


The screenshot shows the Standard Life Wrap portal's profile section. At the top, there are navigation links for 'Profile', 'Documents', 'Help', and 'Logout'. The main content area is titled 'Your profile' and contains tabs for 'Personal details', 'Account details', and 'Security details'. The 'Security details' tab is currently selected, indicated by a yellow background. Below this, the section is titled 'Security details' and contains the text: 'You can change your password online through our secure services with Okta.' A blue 'Change password' button is visible. To the right of the text is a small icon of a padlock with a keyhole.

# 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.



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

## 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.