

# Titan client portal

⌚ 5 minute read

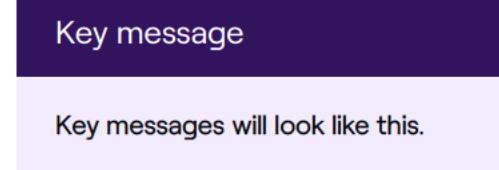
# Titan client portal

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## How to use this guide



Important information  
will look like this.



Useful information will  
look like this.

 We recommend using the zoom function to view the details on the platform screens in this guide.

# Logging in to the Titan client portal

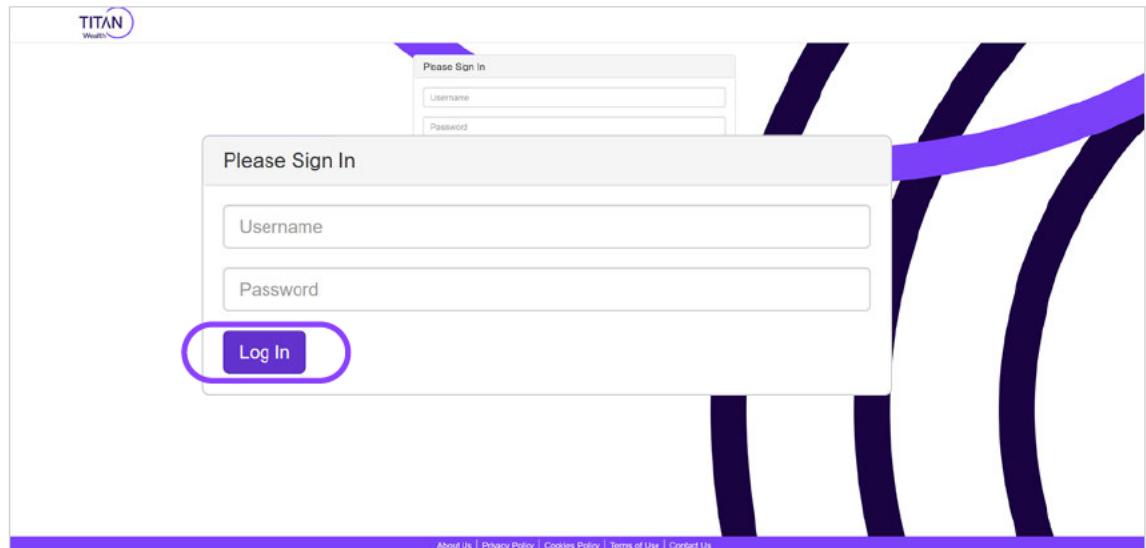
To access the Titan Client Portal, you will need your username and password.

If you have not yet received your login credentials, please contact us directly.

Navigate to:

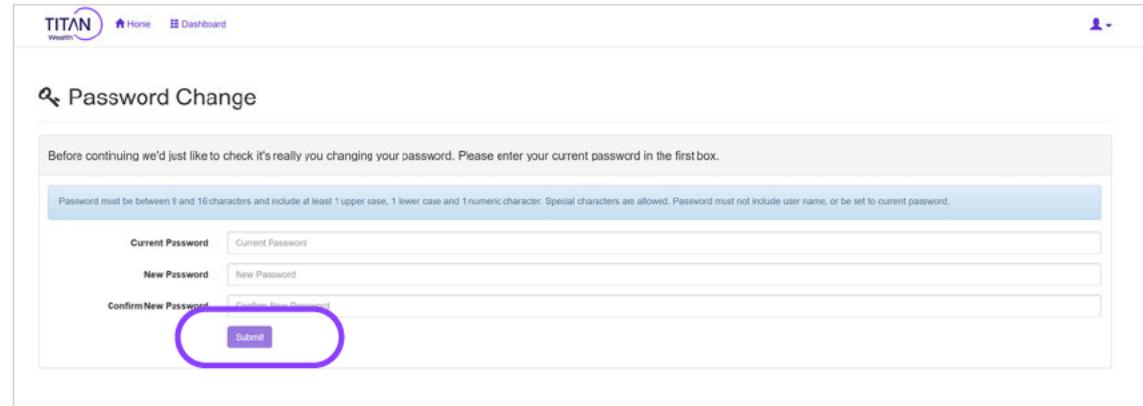
<https://clientportal.titanwealthplatform.com>

Enter your username, password and select 'Log In'.



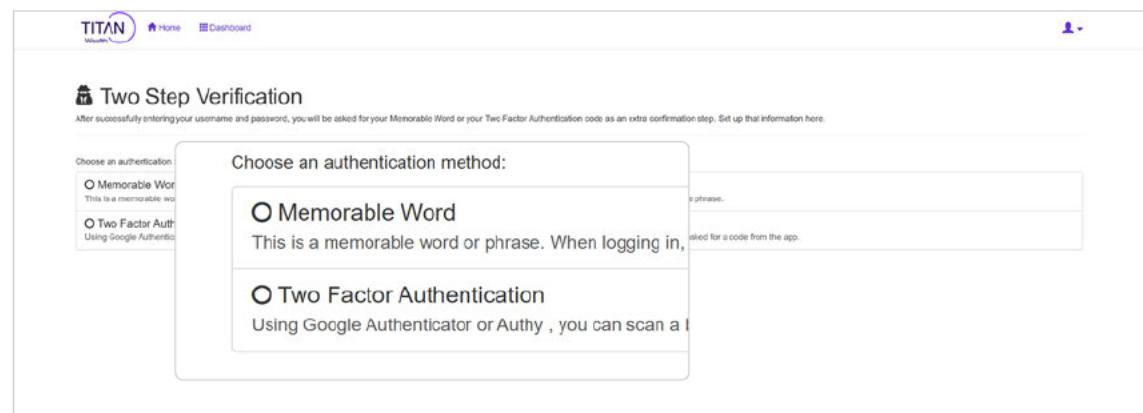
## For first-time users only

If this is your first time logging in, re-enter the temporary password you were provided with, choose and confirm your new password, then select 'Submit'.



The screenshot shows the 'Password Change' page of the Titan client portal. At the top, there are navigation links for 'Home' and 'Dashboard'. Below the title, a sub-header reads: 'Before continuing we'd just like to check it's really you changing your password. Please enter your current password in the first box.' A note below the sub-header specifies: 'Password must be between 8 and 16 characters and include at least 1 upper case, 1 lower case and 1 numeric character. Special characters are allowed. Password must not include user name, or be set to current password.' The form contains three text input fields: 'Current Password', 'New Password', and 'Confirm New Password'. A 'Submit' button is located at the bottom of the form, which is highlighted with a purple oval.

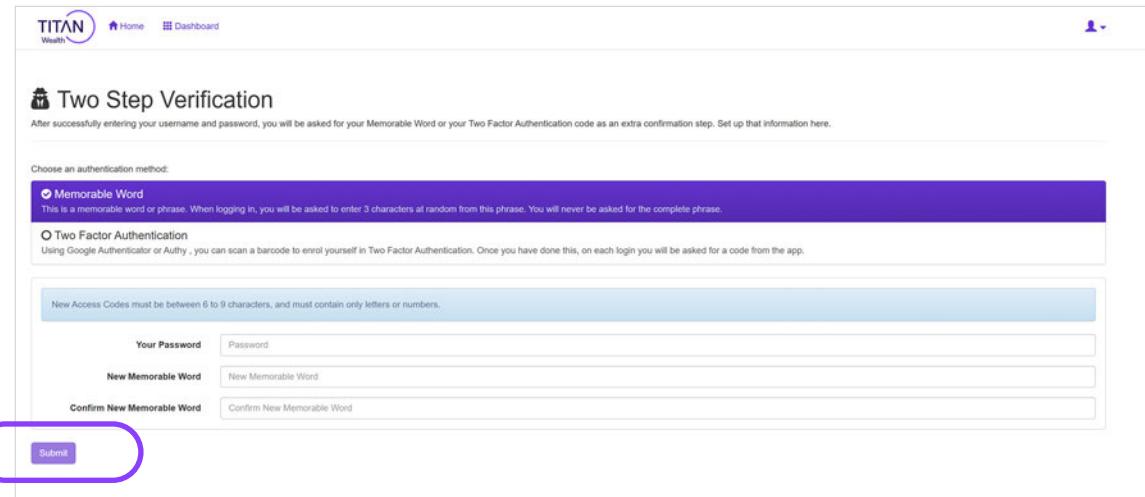
When logging in for the first time you will be asked to change your password. Enter the password you have been provided with, then choose your new password. You will then be prompted to set up Two-Step Verification, which adds an extra layer of security to your account. You can choose one of the following methods:



The screenshot shows the 'Two Step Verification' page of the Titan client portal. At the top, there are navigation links for 'Home' and 'Dashboard'. Below the title, a sub-header reads: 'After successfully entering your username and password, you will be asked for your Memorable Word or your Two Factor Authentication code as an extra confirmation step. Set up that information here.' The page displays two options for setting up two-step verification: 'Memorable Word' and 'Two Factor Authentication'. The 'Memorable Word' option is selected and highlighted with a purple oval. The 'Two Factor Authentication' option is also described: 'Using Google Authenticator or Authy, you can scan a QR code for a code from the app.'

## Memorable word

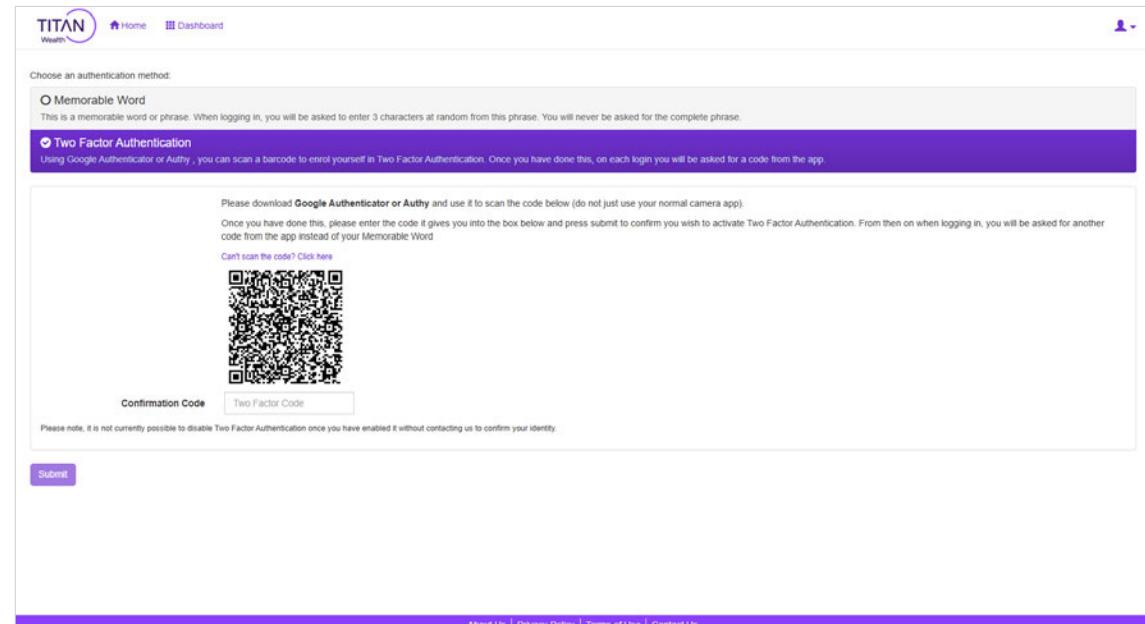
1. Enter your new password
2. Create and enter a memorable word
3. Select 'Submit'



The screenshot shows the 'Two Step Verification' setup page. The 'Memorable Word' option is selected. The 'Submit' button is highlighted with a purple oval.

## Two-factor authentication (2FA)

1. Enter your new password
2. Follow the on-screen instructions to:
  - Download and install an authenticator app
  - Scan the QR code
3. Once complete, enter the confirmation code generated by the app and select 'Submit'



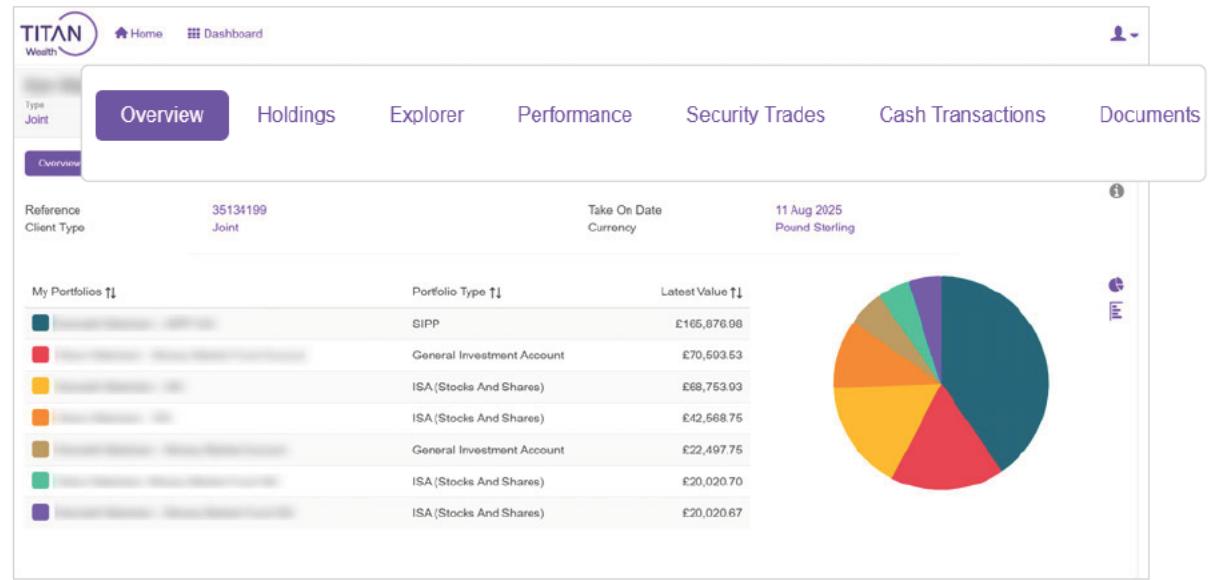
The screenshot shows the 'Two Step Verification' setup page. The 'Two Factor Authentication' option is selected. A QR code is displayed for scanning. The 'Submit' button is highlighted with a purple oval.

## Home Screen

When you log in, the first thing you'll see is the "Home Screen".

At the top of the screen, you'll see the navigation bar – this helps you move between different sections.

When the Home Screen opens, it starts on the Overview tab.

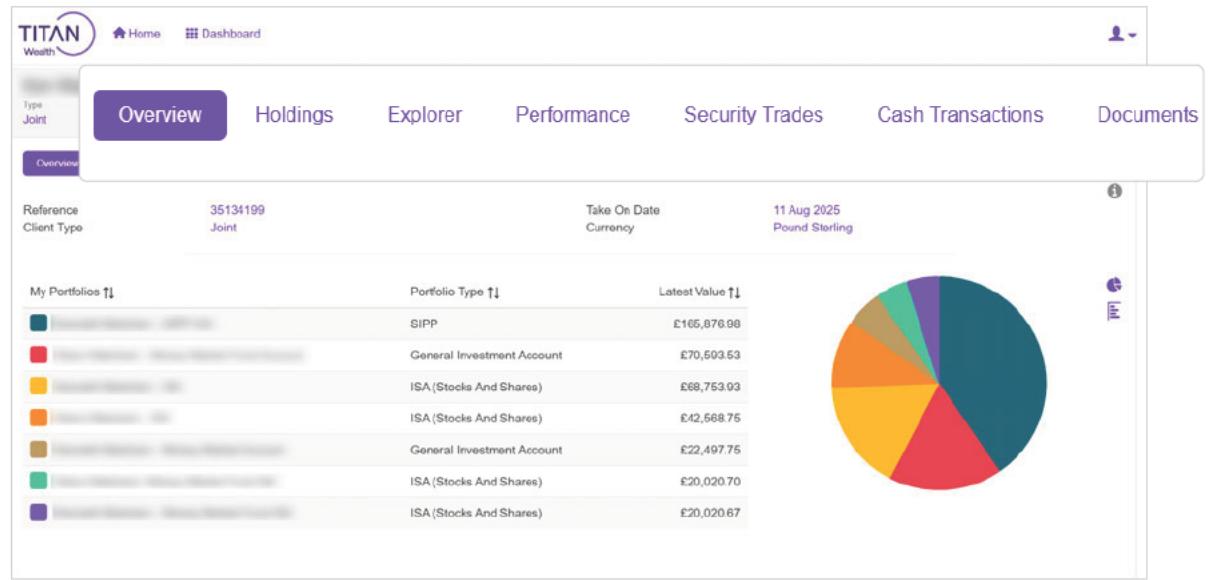


## Overview tab

This page provides you with an overview of your account.

If you have more than one Portfolio, the Pie chart that is displayed breaks down the value of each one.

By selecting each portfolio, you are able to see a more detailed view.



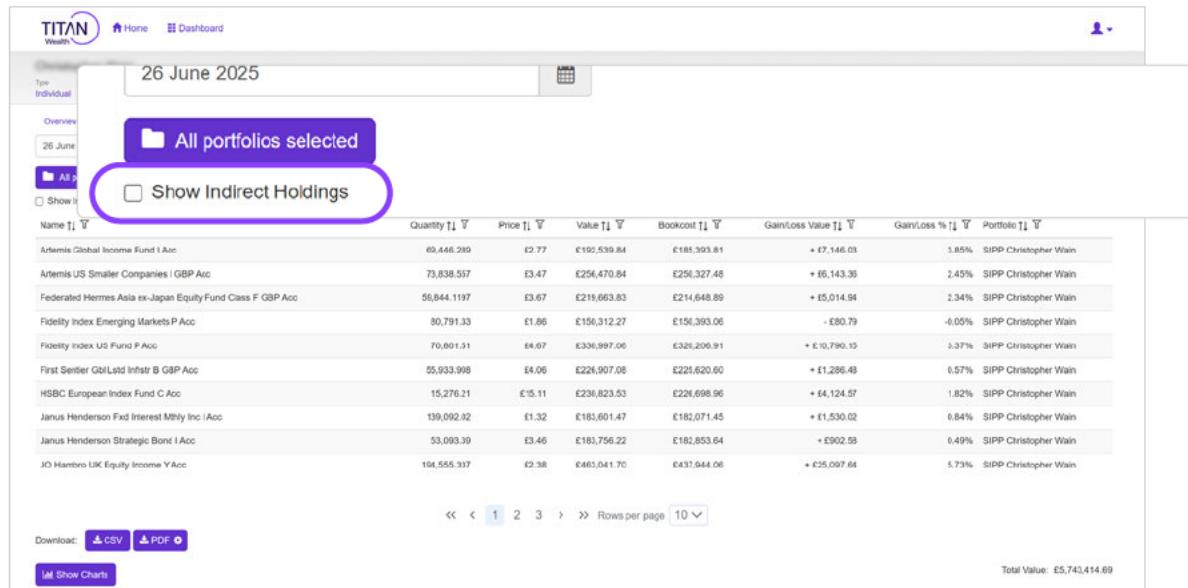
## Holdings tab

The Holdings tab shows all the assets you currently own.

To see what assets you held (and their value) on a previous date, simply choose a date from the calendar.

You can choose which Portfolios to view by selecting 'All Portfolios Selected' and selecting or deselecting them as needed.

To include assets that are not held directly, tick the 'Indirect Holdings' box.



The screenshot shows the 'Holdings' tab in the Titan client portal. At the top, there's a date selector set to '26 June 2025'. Below it, a button labeled 'All portfolios selected' is shown, with a purple box highlighting the 'Show Indirect Holdings' checkbox, which is currently unchecked. The main area is a table of assets:

Name	Quantity	Price	Value	Bookcost	Gain/Loss	Gain/Loss %	Portfolio
Artemis Global Income Fund I Acc	69,446.219	£2.77	£192,539.84	£181,303.81	+ £7,146.03	3.85%	SIPP Christopher Wain
Artemis US Smaller Companies I GBP Acc	73,838.557	£3.47	£256,470.84	£256,327.48	+ £6,143.35	2.45%	SIPP Christopher Wain
Federated Hermes Asia ex-Japan Equity Fund Class F GBP Acc	56,844.1197	£3.67	£219,663.83	£214,648.89	+ £5,014.94	2.34%	SIPP Christopher Wain
Fidelity Index Emerging Markets P Acc	80,791.33	£1.86	£156,312.27	£156,393.06	- £80.79	-0.05%	SIPP Christopher Wain
Fidelity Index US Fund P Acc	70,001.51	£4.07	£336,997.06	£326,200.91	+ £10,796.15	3.37%	SIPP Christopher Wain
First Sentier GblLtd Infrstr B GBP Acc	55,933.998	£4.06	£226,907.08	£221,620.60	+ £1,286.48	0.57%	SIPP Christopher Wain
HSBC European Index Fund C Acc	15,276.21	£15.11	£236,823.53	£226,698.96	+ £4,124.57	1.82%	SIPP Christopher Wain
Janus Henderson Fxd Interest Mthly Inc I Acc	139,092.82	£1.32	£181,601.47	£182,071.45	+ £1,530.02	0.84%	SIPP Christopher Wain
Janus Henderson Strategic Bond I Acc	53,093.39	£3.46	£183,756.22	£182,855.64	+ £902.58	0.49%	SIPP Christopher Wain
JO Hambro UK Equity Income Y Acc	194,555.317	£2.38	£463,041.70	£437,944.06	+ £25,097.64	5.73%	SIPP Christopher Wain

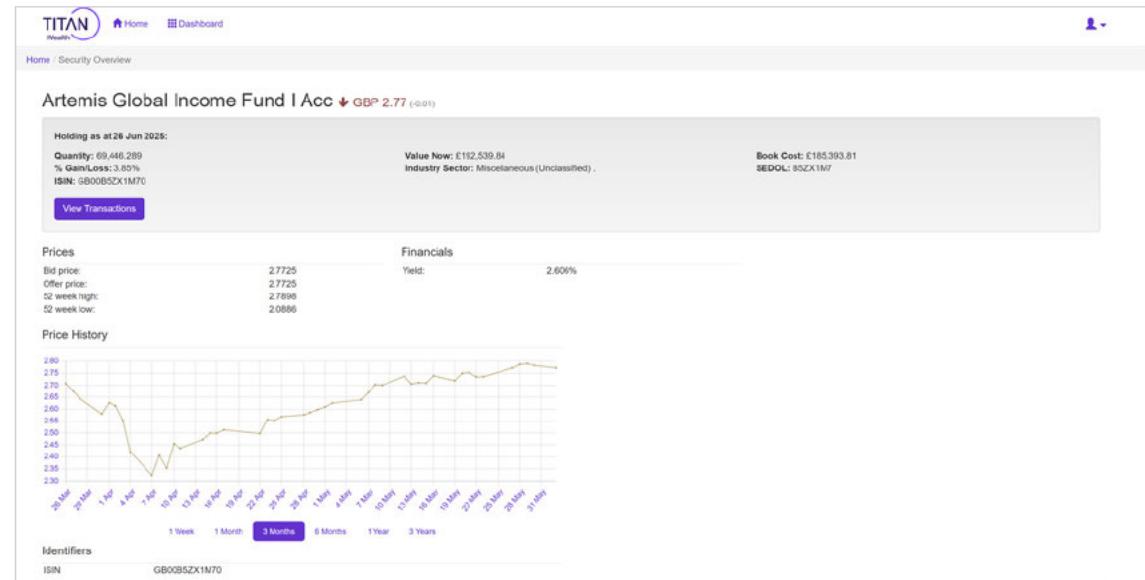
At the bottom, there are download buttons for CSV and PDF, and a 'Show Charts' button. The total value is listed as £5,743,414.69.

When you select a specific security, the Security Overview section appears. This page shows key details about the selected security:

- **Current Quantity:** The total number of shares you currently hold in this security.
- **Book Cost:** The original amount you paid when you purchased the security.
- **Current Value:** The current market value of your holdings in this security.
- **Price History:** A timeline showing how the security's price has changed over time.

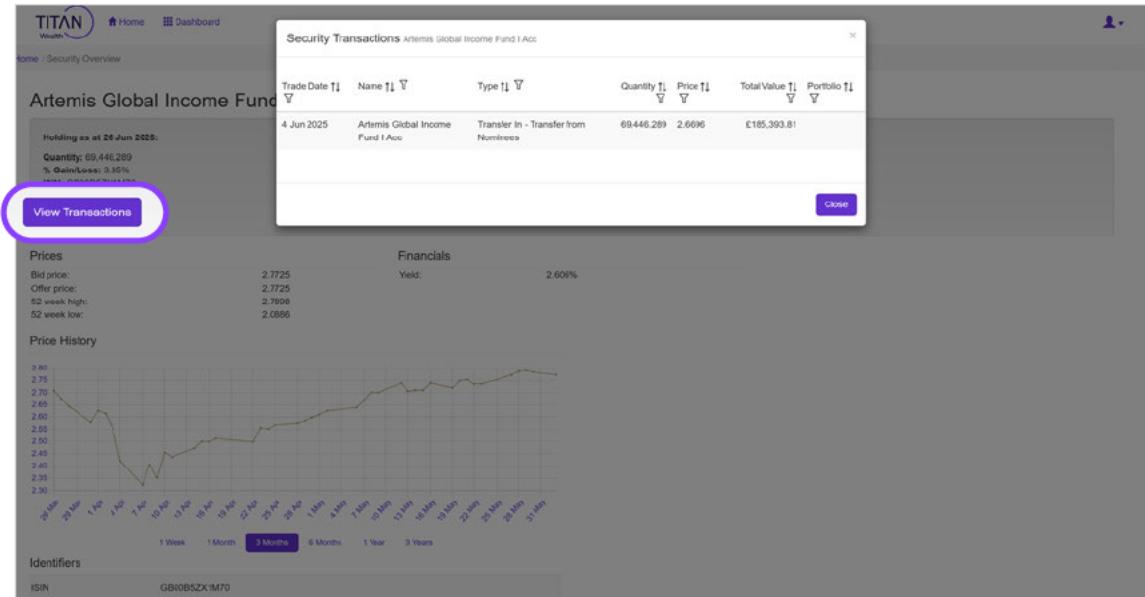


Use this section to quickly compare what you paid for an investment versus what it's worth now.



When you select 'View Transactions' you'll see a list of all transactions related to the selected security. Each entry includes the following details:

- **Trade Date:** The date when the transaction took place.
- **Type of Trade:** The kind of transaction—such as Buy, Sell, or Accumulation Dividend.
- **Amount:** The number of units (or shares) involved in the transaction.
- **Total Value:** The full monetary value of that specific trade.
- **Portfolio Security Processed To:** Shows which Portfolio the security was assigned to.



The screenshot shows the Titan client portal interface. The main page displays the 'Artemis Global Income Fund' with a summary of holdings as of 26 Jun 2025. A purple circle highlights the 'View Transactions' button. A modal window titled 'Security Transactions: Artemis Global Income Fund I Aos' is open, showing a table with one entry: a transfer on 4 Jun 2025 from 'Artemis Global Income Fund I Acc' to 'Transfer In - Transfer from Nominees'. The table includes columns for Trade Date, Name, Type, Quantity, Price, Total Value, and Portfolio. Below the table, there are sections for 'Prices' (showing bid and offer prices, 52-week high/low), 'Financials' (yield: 2.600%), and 'Price History' (a line chart from 2024-01-01 to 2025-06-26). The 'Identifiers' section shows the ISIN: GB00B5ZK1M70. The 'Price History' chart has a '3 Months' button highlighted in blue.

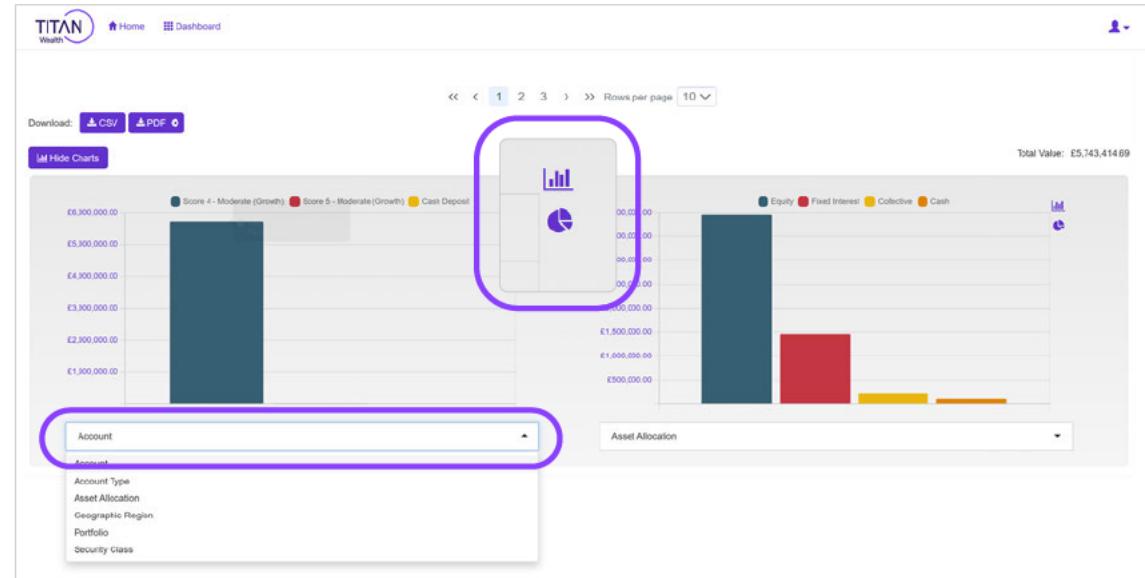
Trade Date	Name	Type	Quantity	Price	Total Value	Portfolio
4 Jun 2025	Artemis Global Income Fund I Acc	Transfer In - Transfer from Nominees	69,446.289	2.6696	£185,393.81	

When you select Show Charts at the bottom of the holdings screen, you'll see visual representations of your data.

Use the drop-down menu to switch between different ways of grouping your data—such as Asset Type, Holding Class, Portfolio Type, or Security Category.



You can try out different chart types to see which one makes the information easiest for you to understand by selecting the icons on the right hand side of the chart.



## Explorer tab

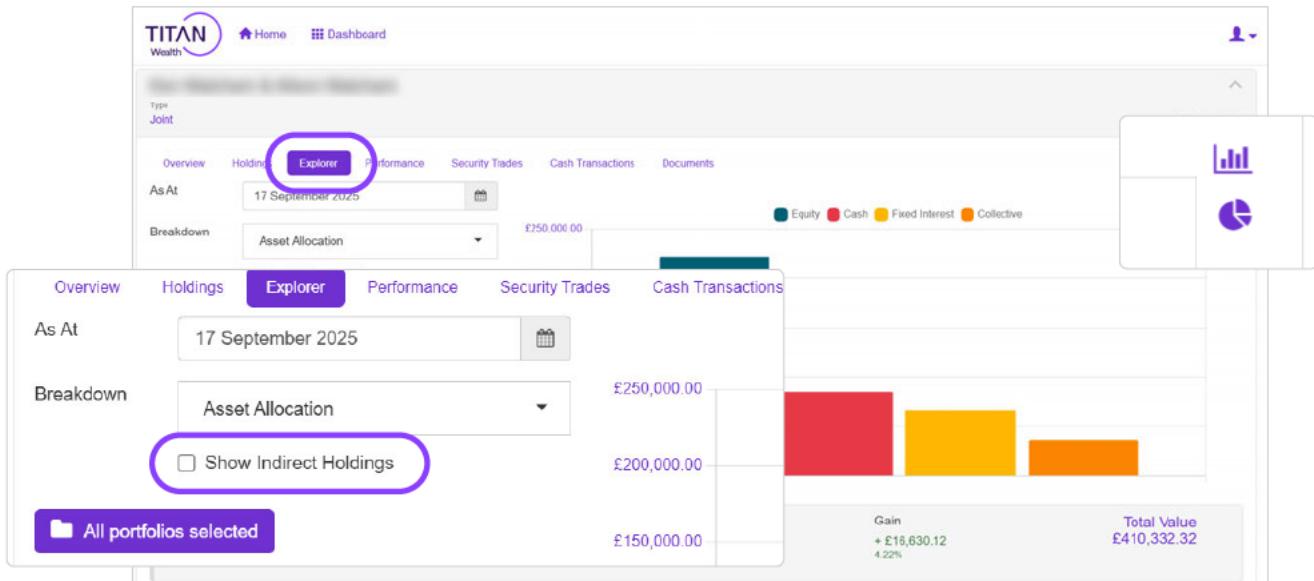
This tab helps you carry out a detailed analysis of your Portfolio(s), focusing on specific types of investments.

You can use the available tools to create a customised view of your assets.

By default, the screen shows a breakdown called 'Asset Allocation'. By selecting this box you can choose other breakdown options.

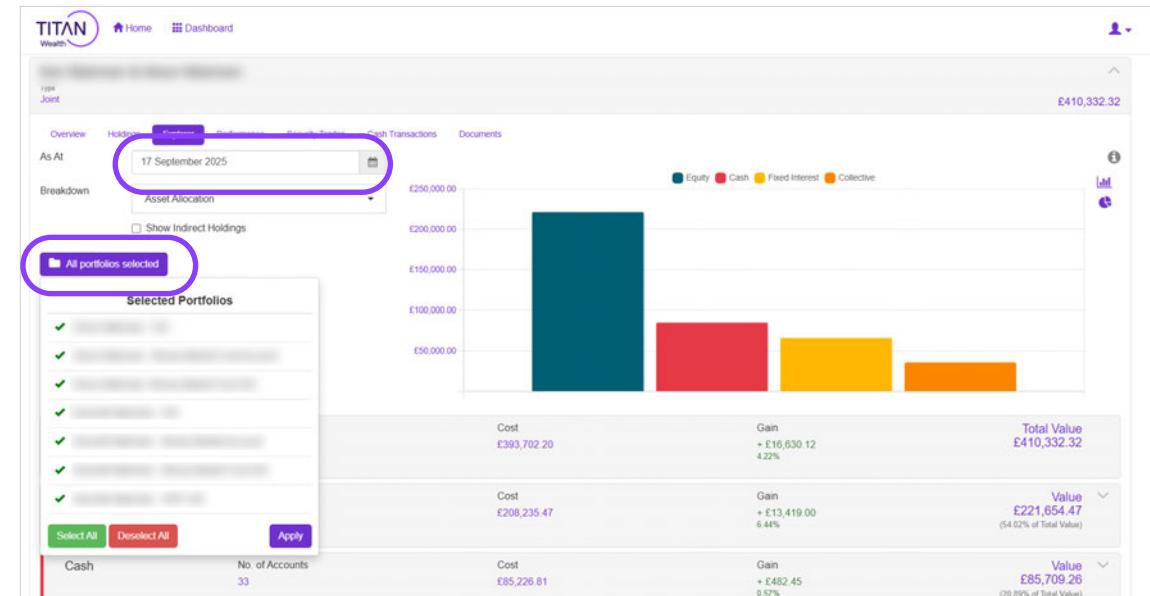
To include assets that are not held directly, tick the 'indirect Holdings' box.

 You can try out different chart types to see which one makes the information easiest for you to understand by selecting the icons on the right-hand side of the chart.



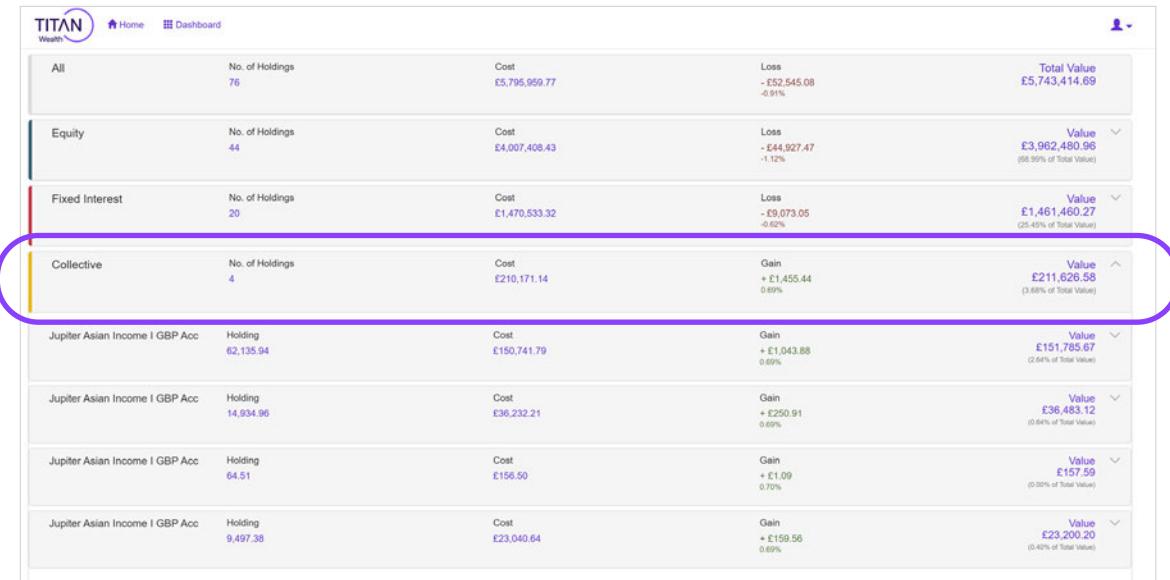
To see the position on a previous date, simply choose a date from the calendar.

You can choose which Portfolios to view by selecting 'All Portfolios Selected' and selecting or deselecting them as needed.



Below the chart, you'll see the 'Top Down Structure Visualisation.' This gives you a step-by-step, layered view of your assets, helping you understand how everything is organised.

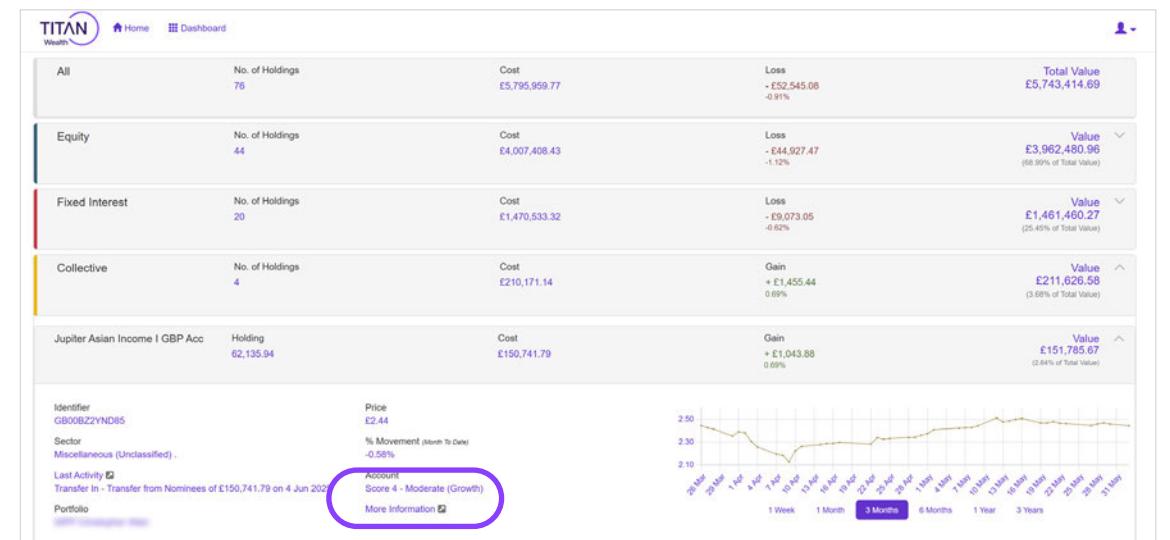
To explore more details, select the grey box. Each time you select a grey box, it will expand revealing more detail about your assets:



All	No. of Holdings	Cost	Loss	Total Value
All	76	£5,795,959.77	- £52,545.08 -0.91%	£5,743,414.69
Equity	44	£4,007,408.43	- £44,927.47 -1.12%	£3,962,480.96 (68.99% of Total Value)
Fixed Interest	20	£1,470,533.32	- £9,073.05 -0.62%	£1,461,460.27 (25.45% of Total Value)
<b>Collective</b>	4	£210,171.14	Gain + £1,455.44 0.69%	£211,626.58 (3.68% of Total Value)
Jupiter Asian Income I GBP Acc	Holding 62,135.94	Cost £150,741.79	Gain + £1,043.88 0.69%	£151,785.67 (2.64% of Total Value)
Jupiter Asian Income I GBP Acc	Holding 14,934.96	Cost £36,232.21	Gain + £250.91 0.69%	£36,483.12 (0.64% of Total Value)
Jupiter Asian Income I GBP Acc	Holding 64.51	Cost £156.50	Gain + £1.09 0.70%	£157.59 (0.00% of Total Value)
Jupiter Asian Income I GBP Acc	Holding 9,497.38	Cost £23,040.64	Gain + £159.56 0.69%	£23,200.20 (0.40% of Total Value)

**Asset Structures:** The top layer shows the main categories your assets are grouped into.

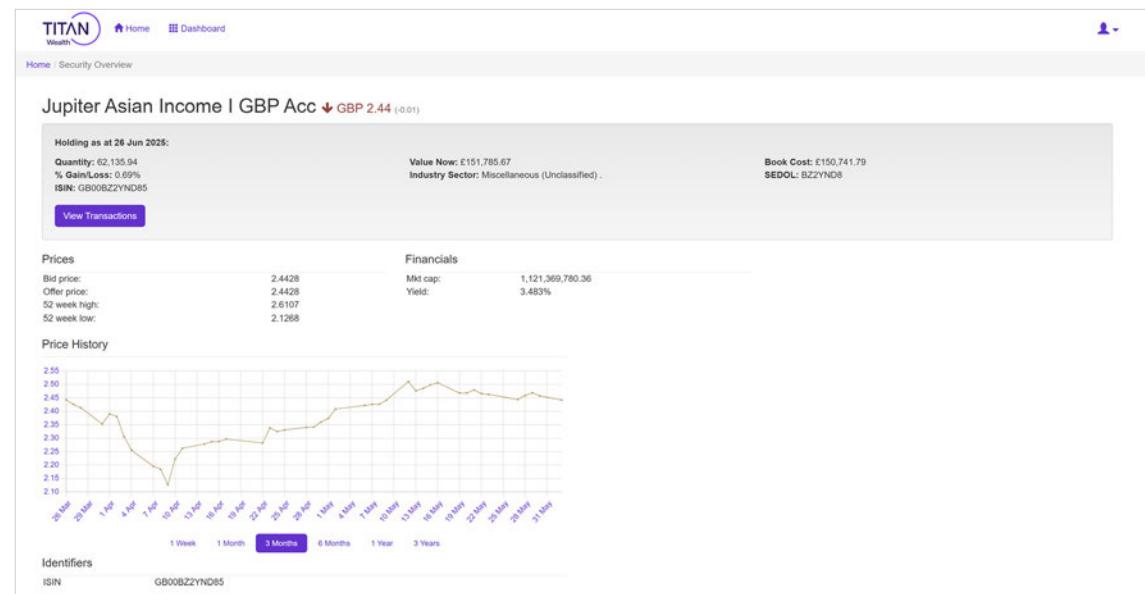
**Specific Securities:** When you click into a category, you'll see a list of the individual securities (investments) within it.



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Equity	44	£4,007,408.43	- £44,927.47 -1.12%	£3,962,480.96 (68.99% of Total Value)
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Jupiter Asian Income I GBP Acc	Holding 62,135.94	Cost £150,741.79	Gain + £1,043.88 0.69%	£151,785.67 (2.64% of Total Value)
<div> <b>Identifier:</b> GB00BZ2YND85  <b>Sector:</b> Miscellaneous (Unclassified) -  <b>Last Activity:</b> Transfer In - Transfer from Nominees of £150,741.79 on 4 Jun 2023  <b>Portfolio:</b> <a href="#">View Portfolio</a> </div>				
<div> <b>Price:</b> £2.44  <b>% Movement (Month To Date):</b> -0.58%  <b>Account:</b> Score 4 - Moderate (Growth)  <a href="#">More Information</a> </div>				
				

**Security Preview:** Selecting on a specific security opens a preview with key details, such as its name, price, and movement percentage—giving you a quick snapshot of how it's performing.

**Security Overview:** For more in-depth information, you can select 'More Information' or 'Last Activity.' These take you to the Security Overview or Transaction View, where you'll find detailed data and insights about that security. Use your browser's back button to navigate back to the previous view.



## Performance tab

This tab gives you a clear overview of how your investments have performed, starting with a default view of the past three months.



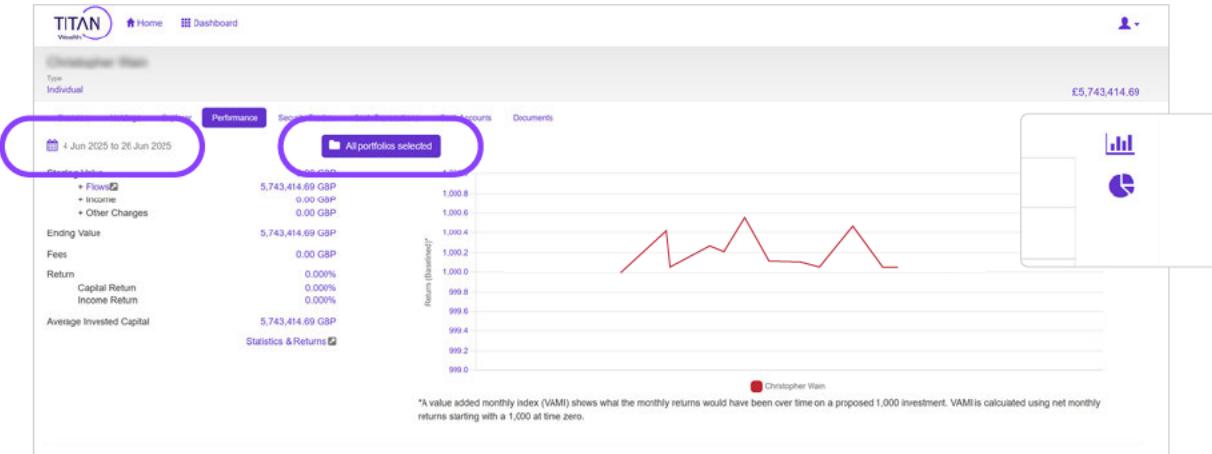
You can adjust the time period to suit your needs or filter by Portfolio by selecting 'All Portfolios selected.'

The performance graph is interactive and offers two viewing options:

- Cumulative Returns (line chart): shows how your investments have grown over the selected time period.
- Monthly Returns (bar chart): shows the return for each individual month within that period.



Use the view that best matches what you're looking for—Cumulative for overall growth, or monthly to spot trends and changes month by month.

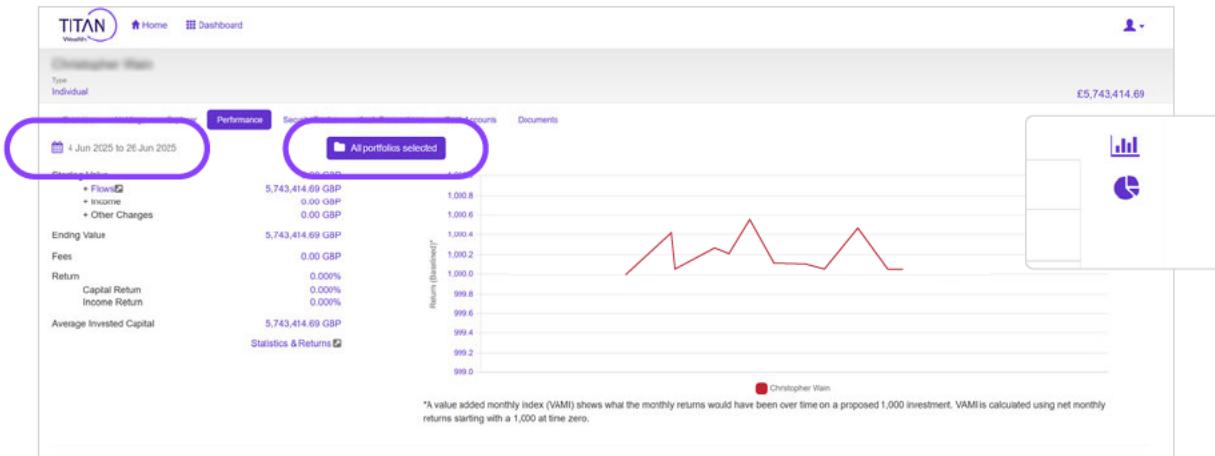


When you select a specific day or month in the graph, you'll see a detailed breakdown of your Portfolio's performance for that period.

This zoomed-in view shows how individual securities contributed to the overall result, helping you understand what drove your Portfolio's performance on that day or month.

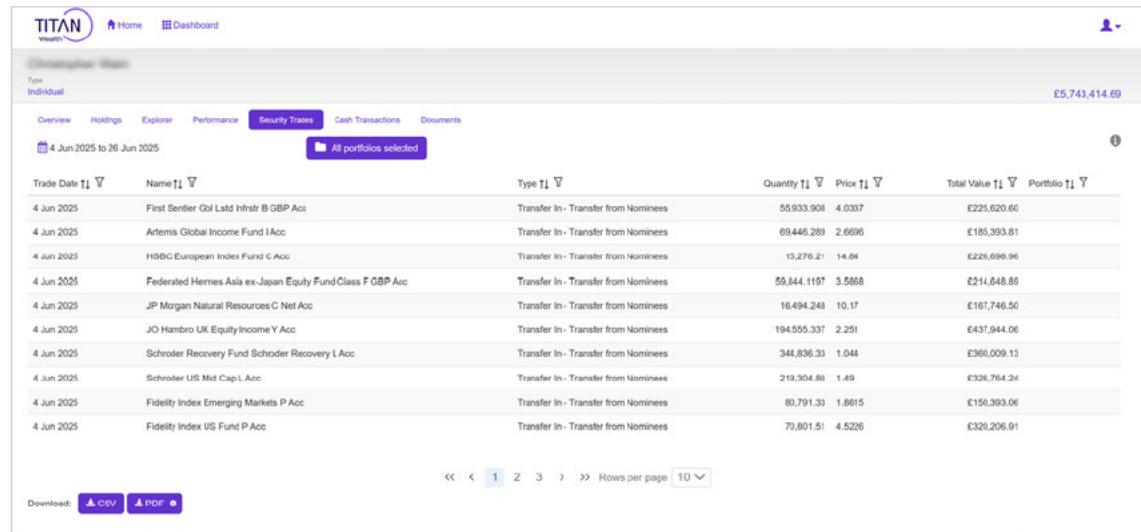


Use this feature to spot which investments had the biggest impact—positive or negative—during a specific time frame.



## Security Trades tab

The Security Trades tab shows a full list of all transactions involving your securities. It provides a complete record of your buying and selling activity, helping you stay informed about past trades and any changes made to your Portfolio.



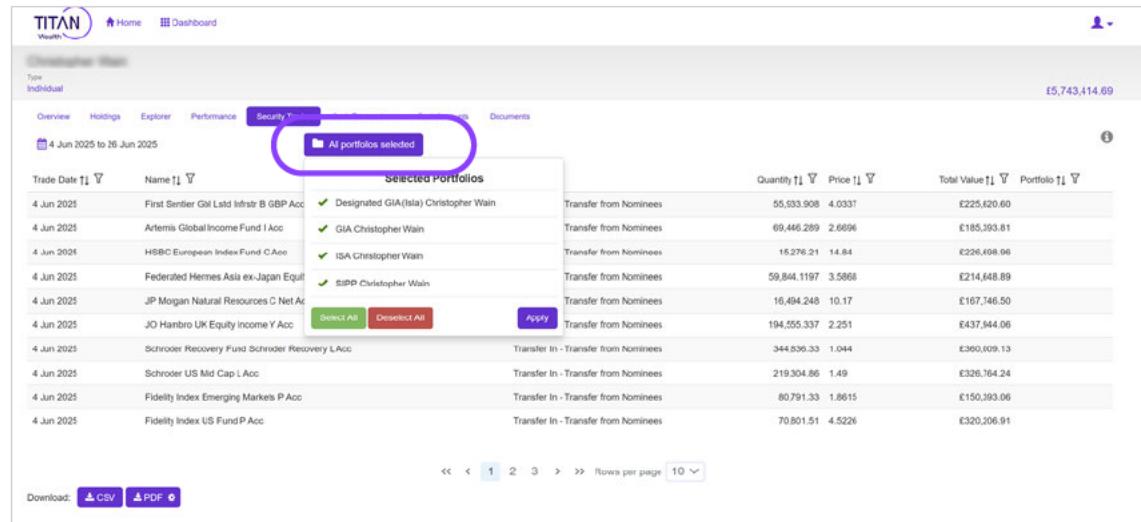
The screenshot shows the Security Trades tab of the Titan client portal. The table lists 11 transactions from June 2025. The columns are: Trade Date, Name, Type, Quantity, Price, and Total Value. The total value for all transactions is £5,743,414.69.

Trade Date	Name	Type	Quantity	Price	Total Value
4 Jun 2025	First Sentier Gil Lstt Infstr B GBP Acc	Transfer In - Transfer from Nominees	55,933.908	4.0337	£225,620.60
4 Jun 2025	Artemis Global Income Fund I Acc	Transfer In - Transfer from Nominees	69,446.289	2.6696	£185,393.81
4 Jun 2025	HSBC European Index Fund C Acc	Transfer In - Transfer from Nominees	15,276.21	14.84	£226,690.96
4 Jun 2025	Federated Hermes Asia ex-Japan Equity Fund Class F GBP Acc	Transfer In - Transfer from Nominees	59,644.1197	3.5868	£214,648.88
4 Jun 2025	JP Morgan Natural Resources C Net Acc	Transfer In - Transfer from Nominees	16,494.248	10.17	£167,746.50
4 Jun 2025	JO Hambro UK Equity Income Y Acc	Transfer In - Transfer from Nominees	194,555.337	2.251	£437,944.06
4 Jun 2025	Schroder Recovery Fund Schroder Recovery L Acc	Transfer In - Transfer from Nominees	344,836.33	1.044	£360,009.13
4 Jun 2025	Schroder US Mid Cap L Acc	Transfer In - Transfer from Nominees	219,304.86	1.49	£326,764.24
4 Jun 2025	Fidelity Index Emerging Markets P Acc	Transfer In - Transfer from Nominees	80,791.33	1.8615	£150,393.06
4 Jun 2025	Fidelity Index US Fund P Acc	Transfer In - Transfer from Nominees	70,801.51	4.5226	£320,206.91

You can also select on any individual security to view more detailed information about that specific trade in the same way as you can in the holding screen.



Select “All portfolios selected” to tailor your view.



The screenshot shows the Security Trades tab of the Titan client portal. A modal dialog box titled "Selected Portfolios" is open, listing four selected portfolios: Designated GIA(ista) Christopher Wain, GIA Christopher Wain, ISA Christopher Wain, and SIPP Christopher Wain. There are buttons for "Select All", "Deselect All", and "Apply".

Trade Date	Name	Type	Quantity	Price	Total Value
4 Jun 2025	First Sentier Gil Lstt Infstr B GBP Acc	Transfer from Nominees	55,933.908	4.0337	£225,620.60
4 Jun 2025	Artemis Global Income Fund I Acc	Transfer from Nominees	69,446.289	2.6696	£185,393.81
4 Jun 2025	HSBC European Index Fund C Acc	Transfer from Nominees	15,276.21	14.84	£226,690.96
4 Jun 2025	Federated Hermes Asia ex-Japan Equity Fund Class F GBP Acc	Transfer from Nominees	59,644.1197	3.5868	£214,648.88
4 Jun 2025	JP Morgan Natural Resources C Net Acc	Transfer from Nominees	16,494.248	10.17	£167,746.50
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4 Jun 2025	Fidelity Index Emerging Markets P Acc	Transfer In - Transfer from Nominees	80,791.33	1.8615	£150,393.06
4 Jun 2025	Fidelity Index US Fund P Acc	Transfer In - Transfer from Nominees	70,801.51	4.5226	£320,206.91

## Cash Transactions tab

The Cash Transactions tab gives you a detailed view of all cash movements within your Portfolio. This includes deposits, withdrawals, and transfers.

It focuses specifically on cash activity, making it easy to manage and track your funds separately from your securities trading.



Use the calendar to change the date range and view data for a specific period.

Select 'All Portfolios selected' to choose which Portfolios you want to include or exclude from the view.

A screenshot of the Titan client portal interface. The top navigation bar includes 'Home', 'Dashboard', and a user profile icon. The main content area is titled 'Customer View' and shows 'Type: Individual'. Below this is a navigation bar with tabs: 'Overview', 'Holdings', 'Options', 'Performance', 'Security Trades', 'Cash Transactions' (which is highlighted in blue and has a purple oval around it), 'Cash Accounts', and 'Documents'. A date range selector shows '4 Jun 2025 to 28 Jun 2025' and a checkbox for 'All portfolios selected'. The main table displays cash transaction data with columns: Transaction Date, Type, Debit, Credit, Comment, and Portfolio. The data shows four entries of 'Money In' on 4 Jun 2025 with amounts £81,628.47, £13,341.84, £76.55, and £12,000.02 respectively. At the bottom, there are 'Download' buttons for CSV and PDF.

When you select a transaction, you'll see more detailed information, including:

**Transaction Type:** Describes the kind of cash movement (e.g., deposit, withdrawal).

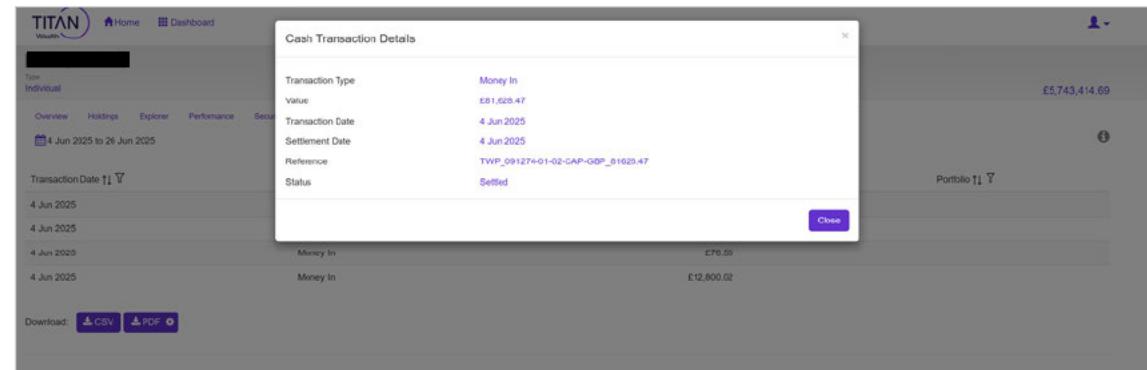
**Value:** The amount of money involved in the transaction.

**Transaction Date:** The date when the transaction was initiated or ownership changed.

**Settlement Date:** The date when the transaction is officially completed.

**Status:** Shows whether the transaction is settled or still pending.

**Comment:** A short note that often includes details like the security traded, its price, and the trade date.



The screenshot shows the Titan client portal interface. A modal window titled "Cash Transaction Details" is open, displaying the following information:

Transaction Type	Money In
Value	£81,628.47
Transaction Date	4 Jun 2025
Settlement Date	4 Jun 2025
Reference	TWP_09127+01-02-GAP-GBP_01620.47
Status	Settled

Below the modal, a summary of the portfolio is visible, showing a total value of £5,743,414.69. The background also shows a navigation bar with links like Home, Dashboard, Overview, Holdings, Explorer, Performance, and Security.

## Account Management

The icon in the top-right corner of the screen lets you manage your personal details, password, and memorable word.

WELCOME

Last Login: Jun 26, 2025, 1:58:34 PM

My Details

**Password**

Two Step Verification

Default Page

Contact Us

Logout

- To change your password, select 'Password.' Enter your new password (making sure it meets the required criteria), then click 'Submit.'

Before continuing we'd just like to check it's really you changing your password. Please enter your current password in the first box.

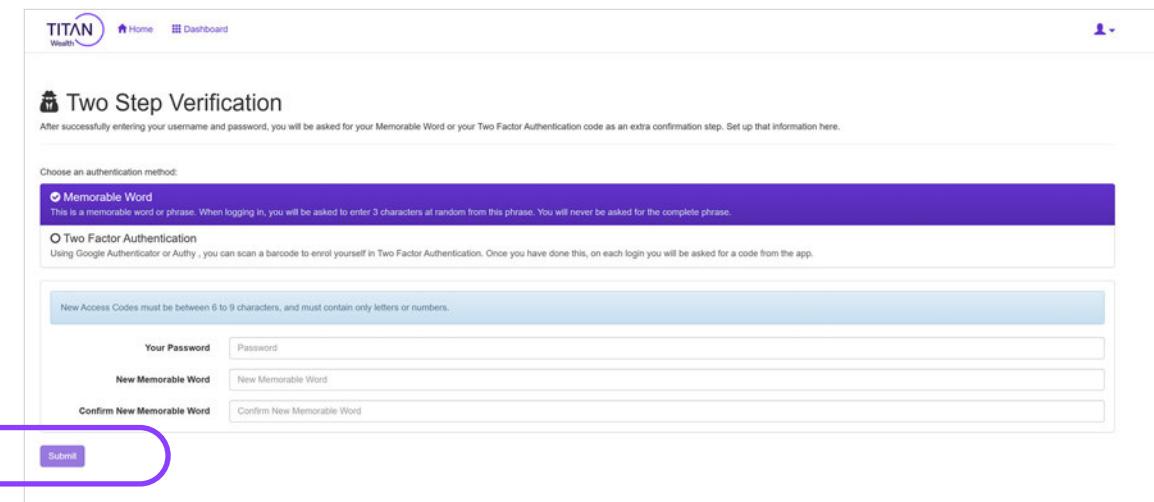
Current Password:

New Password:

Confirm New Password:

**Submit**

- To change your memorable word, select 'Two Step Verification.' You'll be asked to enter your current password, followed by your new memorable word. Once entered, click 'Submit.'



The screenshot shows the 'Two Step Verification' page in the Titan client portal. At the top, there are navigation links for 'Home' and 'Dashboard'. On the right, there is a user profile icon. The main title is 'Two Step Verification' with a gear icon. Below the title, a sub-instruction reads: 'After successfully entering your username and password, you will be asked for your Memorable Word or your Two Factor Authentication code as an extra confirmation step. Set up that information here.' A section titled 'Choose an authentication method:' contains two options: 'Memorable Word' (selected, highlighted with a purple box) and 'Two Factor Authentication' (unchecked). A note under 'Memorable Word' explains: 'This is a memorable word or phrase. When logging in, you will be asked to enter 3 characters of random from this phrase. You will never be asked for the complete phrase.' Below this, there is a note for 'Two Factor Authentication' stating: 'Using Google Authenticator or Authy, you can scan a barcode to enrol yourself in Two Factor Authentication. Once you have done this, on each login you will be asked for a code from the app.' A note at the bottom of the page specifies: 'New Access Codes must be between 6 to 9 characters, and must contain only letters or numbers.' There are four input fields: 'Your Password' (disabled), 'New Memorable Word' (disabled), 'Confirm New Memorable Word' (disabled), and a 'Submit' button at the bottom, which is also highlighted with a purple box.

## Dashboard view

Selecting 'Dashboard' in the top toolbar takes you to a customisable view of your Portfolio.

To customise individual widgets, click the pencil icon inside each widget.

To choose which widgets appear, select the cog icon in the top-right corner of the screen.

Recent Activity

Date	Value	Type	Transaction Type	Description
16 Sept 2025	£-1,100.00	Cash	Purchase	Purchase of 1,049.6183 IFSL Square Mile International Fixed Interest Fund @ 1.048. External Ref = 2509151221_314b2091
16 Sept 2025	£2,400.00	Cash	Purchase	Purchase of 2,290.0763 IFSL Square Mile International Fixed Interest Fund @ 1.048. External Ref = 2509151221_314b2091
16 Sept 2025	£1,100.00	Security	Buy	Buy of 1,049.6183 IFSL Square Mile International Fixed Interest Fund @ 1.048
16 Sept 2025	£2,400.00	Security	Buy	Buy of 2,290.0763 IFSL Square Mile International Fixed Interest Fund @ 1.048
16 Sept 2025	£0.300.00	Cash	Purchase	Purchase of 266.358 L&G Cash Trust I Acc @ 1.1263. External Ref = 2509151221_80b12595e

Security Prices

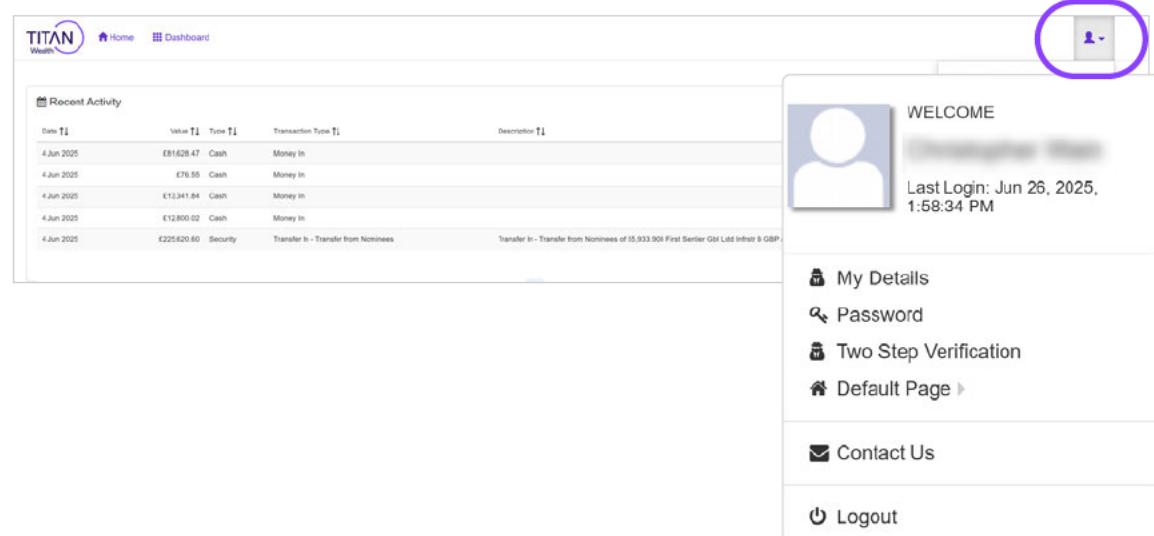
Name	Value	Date	Movement
Abrdn Sterling Money Market I Acc	£1,3254	5 Aug 2025	0.00
ACUMEN OEIC IFSL TITAN EQUITY GROWTH X GBP ACC Accumulation	£1,2707	8 Jan 2025	0.00
Artemis Global Income Fund I Acc	£3,950	5 Aug 2025	0.03
Artemis US Smaller Companies I GBP Acc	£3,8624	5 Aug 2025	0.05
BlackRock Cash D Acc	£2,7672	5 Aug 2025	0.00

Your Portfolios

Client Name	Portfolio Name	Value
...	...	£42,568.75 on 16 Sept 2025
...	...	£70,993.53 on 16 Sept 2025
...	...	£20,020.79 on 16 Sept 2025
...	...	£10,000.00 on 8 Sept 2025
...	...	£0.00 on 8 Sept 2025

If you'd like to make this your default view:

Select the account management icon in the top-right corner.

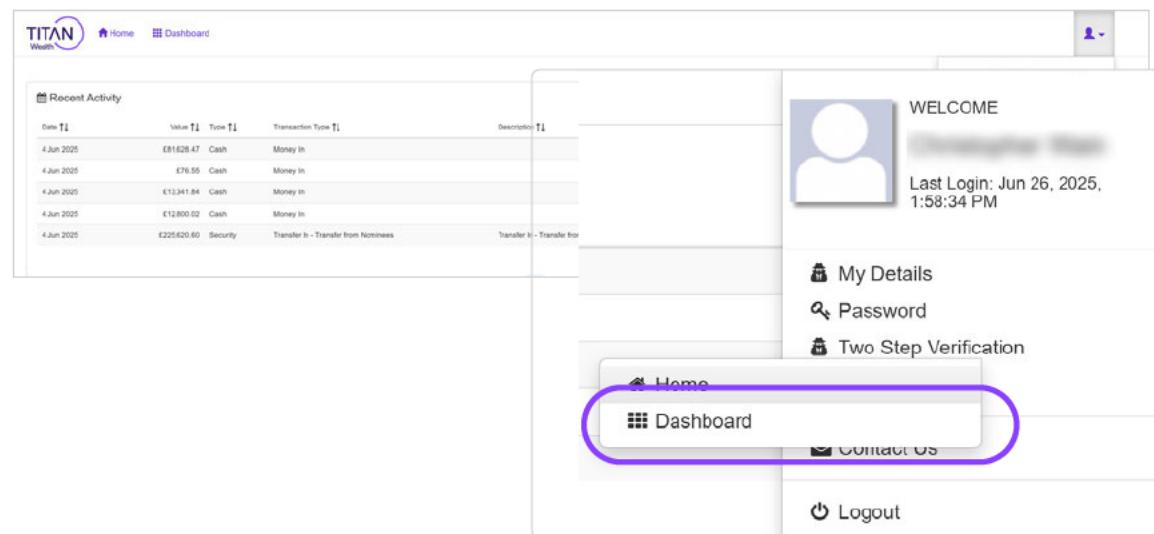


The screenshot shows the Titan client portal interface. At the top, there is a navigation bar with 'TITAN Wealth' logo, 'Home', and 'Dashboard' buttons. Below this is a 'Recent Activity' table with columns: Date, Value, Type, Transaction Type, and Description. The table lists several transactions from June 2025. To the right of the table is a sidebar with a user profile icon and the text 'WELCOME'. Below this are links: 'Last Login: Jun 26, 2025, 1:58:34 PM', 'My Details', 'Password', 'Two Step Verification', 'Default Page', 'Contact Us', and 'Logout'. In the top-right corner of the main content area, there is a small account management icon (a person icon with a minus sign) which is circled in purple.

Select 'Default View.'

Then choose 'Dashboard.'

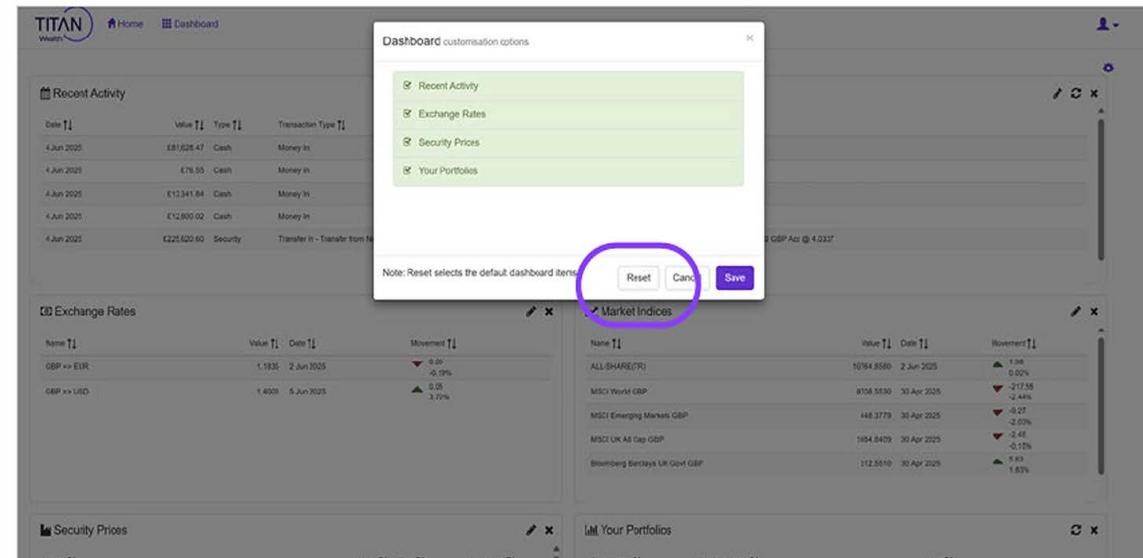
To return to your previous view, simply click 'Clients' to the left of 'Dashboard' in the top toolbar.



The screenshot shows the Titan client portal interface. At the top, there is a navigation bar with 'TITAN Wealth' logo, 'Home', and 'Dashboard' buttons. The 'Dashboard' button is highlighted with a purple oval. Below this is a 'Recent Activity' table with columns: Date, Value, Type, Transaction Type, and Description. The table lists several transactions from June 2025. To the right of the table is a sidebar with a user profile icon and the text 'WELCOME'. Below this are links: 'Last Login: Jun 26, 2025, 1:58:34 PM', 'My Details', 'Password', 'Two Step Verification', 'Home', 'Dashboard' (which is circled in purple), 'Contact Us', and 'Logout'.



To reset the view on the Dashboard screen to the default, select 'Reset' from the cog icon.



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