

The Titan Pensions & Investments Personal Finance Portal



Register now to get access to the Titan P&I Personal Finance Portal (PFP), a revolutionary new app that gives you access to view all of your finances in one place 24/7 - anywhere, on your laptop, desktop, mobile phone or tablet. PFP enables you to view your fund information and financial portfolio at the click of a button. So, whether you're looking for an up-to-date valuation of your portfolio, want to assess how you're progressing against your goals or simply wish to get in touch, PFP has it covered.

Logging in

Logging into your Personal Finance Portal is simple and easy. All you need to do is follow the link in your email, click the register button and follow the instructions. Once you have set your password, your Personal Finance Portal is completely secure. However, we have also made Two-Factor Authentication available should you wish to use it.

Once you have registered, you can find the Titan P&I Personal Finance Portal at titanpi.gb.pfp.net



Benefits



Secure Messaging Between Us and You

With email and post increasingly open to being intercepted, we treat the security of the data you share with us with the utmost importance. The Titan P&I PFP provides you with a secure messaging service, so you can quickly get in touch with us and have the peace of mind of knowing that any information you share is encrypted and completely private.



A Secure Document Vault

The Titan P&I PFP provides you with a secure document vault, so you can house all your financial documents scanned and held online where they are secure and fully backed up - much safer and more convenient than the bottom of the filing cabinet.



Realtime Data

What you see in your PFP is a representation of the data your Adviser has recorded during meetings with you. However, you are able to log in and update a change in your finances in the PFP which will then feed back to your Adviser in real-time. This allows your data to be as up-to-date as possible so that you and your Adviser can work simultaneously on tasks such as updating information for review meetings.



Budgets

The PFP enables you to monitor how your expenditure compares to pre-determined figures. You can adjust your budgets whenever you wish and watch how your expenditure matches any changes.



A Comprehensive Picture Of Your Finances

The Titan P&I PFP enables you to build a comprehensive picture of your entire financial position by aggregating your short, medium and long-term finances whilst, at the same time, enabling us to manage and service your financial needs more effectively.

Getting started

Step 1

Please click the link in the email we have sent to you.

Click **Register** at the top of the screen.

 **Register**

 **Login**

Step 2

Enter your email, click **I'm not a robot** and start your registration.

 **Registration**

 You are only able to register with the email address that you have provided to your Adviser. After registration this will be the email address you log in with.

Email Address

I'm not a robot 
reCAPTCHA
Privacy - Terms

Start Registration >

-  **Step 1**
Enter your email address that you have given to your adviser.
-  **Step 2**
Tap the "Start Registration" button and we'll send an activation link to your email address.
-  **Step 3**
Tap the link in the email and follow the on-screen instructions.
-  **Step 4**
Congratulations! You are ready to log in to your Personal Finance Portal.

Step 3

You will be emailed an activation link from Personal Finance Portal. Please click **Activate Account**.

Answer the two security questions. If you need any help with answering these questions, please contact us.

Create your password, this needs to be a **minimum of 8 characters and contain at least one capital letter and one number**.

After accepting the terms and conditions, your Titan P&I Portal is now activated

Confirm Existing Security Information

Date of birth DD/MM/YY

National Insurance Number

Submit >

Step 4

TITAN Pensions & Investments

Add an extra layer of security with Two-Factor Authentication

We have noticed you don't have two-factor authentication on your account, would you like to set this up now?
It will only take a few minutes and is highly recommended.

 Two-Factor Authentication is a security feature that requires you to authenticate your login with two different methods.

 These two methods consist of something you know (your password) and something you have (your mobile/tablet device).

 The benefits of Two-Factor authentication include improved security and reduced risk of hacking.

Two-Factor Authentication (2FA) requires you to install an authenticator app. This is normally done on your mobile or tablet device, but can be done as a browser extension on your desktop PC. Each time you log in you will need to use the authenticator app, which will give you a special unique code to enter to complete your log in, in addition to your normal password.

[Get Started >](#) [Remind me in a week >](#)

When logging in to your Titan P&I Portal for the first time, you will be asked if you wish to set up two factor authentication (2FA). Although your account is completely secure using your email and password, 2FA is available for anyone who wishes to install it to provide an additional layer of protection. However, some clients have found the process of setting up 2FA to be challenging and so if this applies to you, simply click "Remind me in a week" and you can bypass this option.

Your Dashboard

 **Portfolio** £80k

- Assets £80k
- Liabilities £0

Last updated 30 January 2023

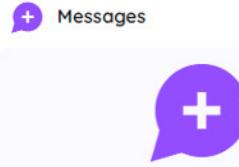
[Open Summary](#)

 **Profile**

Status **Incomplete**

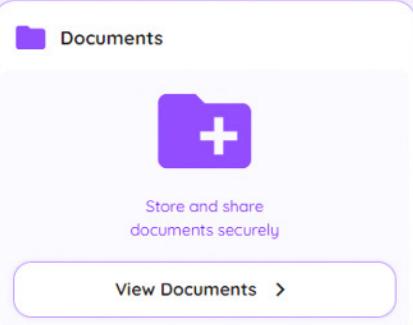
Last updated 08 November 2022

[View Profile >](#)

 **Messages** Unread 0

Send & receive secure messages with your Adviser

[Compose Message](#) [View Messages >](#)

 **Documents**

Store and share documents securely

[View Documents >](#)

- Here you can view your Portfolio and the value of the plans we manage for you.
- Add or update your personal information on our records under **Profile**.
- Send and receive secure Messages with Titan.
- Store or share any Documents securely.

Should you have any questions, please contact our offices on **01536 462 700**



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