



Financial adviser – SIPP online services user guide

This guide explains how to log into new accounts, change passwords and view information on customer accounts.

If you need any help, including getting new users set up or to unlock or reset their account,

please email us at phoenix-access@sipp-phoenixwealth.co.uk

or call our dedicated support team on 0345 671 5507.

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Logging in

Once we've registered you, we'll send you two emails, one with your new user name and the other with a link to the screen below to set your own password.



Change Password

Your password must be at least eight characters long and must contain at least one upper case character, one lower case character, and two numbers.

New Password:


Confirm New Password:

Save

Once you've created your password, you'll be redirected within five seconds to the login page below.

Input your username and newly created password and select 'Login'.

This page is to access online services for self-invested policies only, once you've registered.
To access non self-invested policies please click [here](#).

 PHOENIX WEALTH

[Request a new password](#)

Need help?

- Visit our [support webpage](#)
- Email our [dedicated team](#)
- Call us on 0345 671 5507

We're here 9.00am to 5.00pm, Monday to Friday. We may record calls for training and monitoring purposes and to improve our services.

Phoenix Life Limited, trading as Phoenix Wealth, is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Phoenix Life Limited is registered in England No. 1016269 and has its registered office at: 1 Wythall Green Way, Wythall, Birmingham, B47 6WG.

You'll then be directed to the 2-factor authentication registration page below, where you'll need to follow the on screen instructions

[Logout](#)



To log in, we now need you to complete some additional security steps. Just follow the easy steps below:

1 - You need a smartphone application to generate a second factor authentication code (known as a token). You'll need to generate a token from this application whenever you login to our online services.

We recommend [Authy](#) (iOS/Android) but you can use any application compatible with RFC 6238 TOTP (you'll be able to check this in the application's technical details on your appstore).

2 - Once you have the application on your phone, please follow the application's instructions to 'Add Account' and scan the QR code below.



When account is added please continue to the [token validation step](#).

Need help?

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- Email our [dedicated team](#)
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Once registered, select 'token valiation step' and you'll be directed to the 2-factor authentication validation page below

[Logout](#)

Please enter your token below and then click login (Fnz: Phoenix - Username)

[Login](#)

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- Email our [dedicated team](#)
- Call us on 0345 671 5507

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Enter a valid token and select 'Login', you'll then be directed to your online services start page.

If you enter an incorrect or expired token, the following error message will appear.

[Logout](#)



Please enter your token below and then click login (Fnz: Phoenix - Username)

Login

⚠ Invalid token. Please check your application and try again.

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- Visit our [support webpage](#)
- Email our [dedicated team](#)
- Call us on 0345 671 5507

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Please note, each token only lasts for 30 seconds before it is replaced by a new one. So you may get an expired token scenario if you enter a token but it expires before you select 'Login'.

If you enter an invalid token three times in a row the 2-factor authentication account will be locked with the following error message.

[Logout](#)

Please enter your token below and then click login (Fnz: Phoenix - Username)

[Login](#)

ⓘ Your account has been locked. If you would like further assistance, please contact our Client Services Team.

Need help?

- Visit our [support webpage](#)
- Email our [dedicated team](#)
- Call us on 0345 671 5507

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Please email us at phoenix-access@sipp-phoenixwealth.co.uk to request your account is unlocked. This can take three to five business days in busy times

1. Click on the 'Lock' icon.
2. Create a memorable phrase and answers for at least five security questions. The memorable phrase must be a minimum of six letters, and the answers a minimum of five.
3. Click 'Save' on the bottom right hand corner of the screen.

PHOENIX WEALTH

Dashboard

Existing Accounts

Customer

Admin

Change Login

☰

Change Password

Change Logon Details

Change password

Please choose a new password that meets the following conditions:

- A minimum password length of 8 characters
- Does not repeat the same character more than three times in succession
- Contains a combination of three of the four character types below:
 - Upper case alphabetic
 - Lower case alphabetic
 - Numeric
 - Special character/symbol (excluding "!", "", "&", "%", "\$", "#", "@", "~", "\\", "/", "?", "*", "< ", "> ", "" ", "“ ", "” ", "– ", "— ")
- Is not one of the 13 most recently used passwords

Current Password:

New Password:

Confirm New Password:

Go

Security questions

Please enter your memorable phrase and also answers to at least five of the following questions.

Hide answers

What is your memorable phrase?

Father's forename?

Place of birth?

Mother's maiden name?

What is the first name of your oldest friend?

What was the name of your first school?

What is your favourite colour?

What is your favourite animal?

First street in which you lived that you can remember?

What was your favourite subject at school?

What is your favourite film?

Save

4. A message will appear confirming your memorable phrase and security questions are updated.

Change Logon Details

🕒 Memorable phrase updated.
Security questions updated.

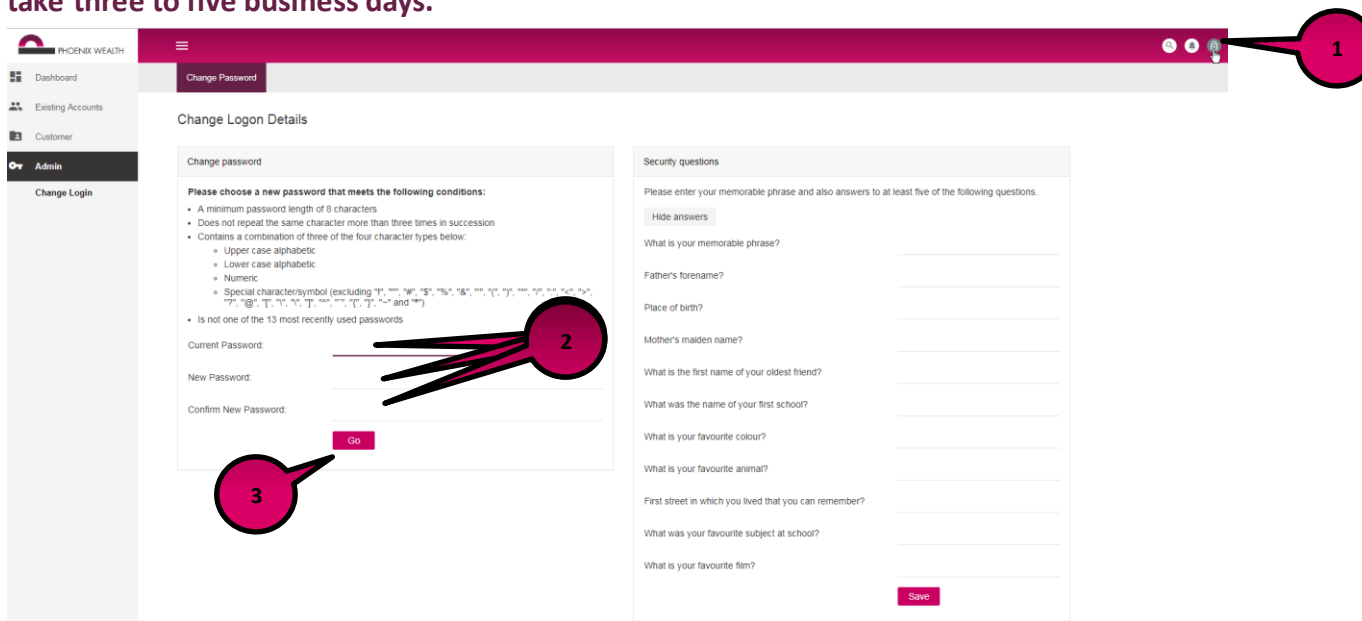
4

Changing your password

If you want to change your password at any stage you need to:

1. Click on the 'Lock' icon.
2. Enter your current password followed by the new password and confirm your new password.
3. Click 'Go'.
4. A message will appear confirming your password is updated.

You'll only be able to do this yourself if you set your memorable phrase and security question answers (as explained on page 8), otherwise you'd need to email us at phoenix-access@sipp-phoenixwealth.co.uk We'd get back to you as soon as possible, but at busy times it could take three to five business days.



The screenshot shows the 'Change Logon Details' page in the Phoenix Wealth system. The page is divided into two main sections: 'Change password' and 'Security questions'.

Change password section:

- Callout 1:** Points to the 'Lock' icon in the top right corner of the page header.
- Callout 2:** Points to the 'Current Password' field.
- Callout 3:** Points to the 'Go' button.

Security questions section:

- Header: 'Please enter your memorable phrase and also answers to at least five of the following questions.'
- Section: 'Hide answers' (button).
- Questions:
 - What is your memorable phrase?
 - Father's forename?
 - Place of birth?
 - Mother's maiden name?
 - What is the first name of your oldest friend?
 - What was the name of your first school?
 - What is your favourite colour?
 - What is your favourite animal?
 - First street in which you lived that you can remember?
 - What was your favourite subject at school?
 - What is your favourite film?
- Buttons: 'Go' (in the password section) and 'Save' (at the bottom of the security questions section).

Change Password

4

Change Logon Details

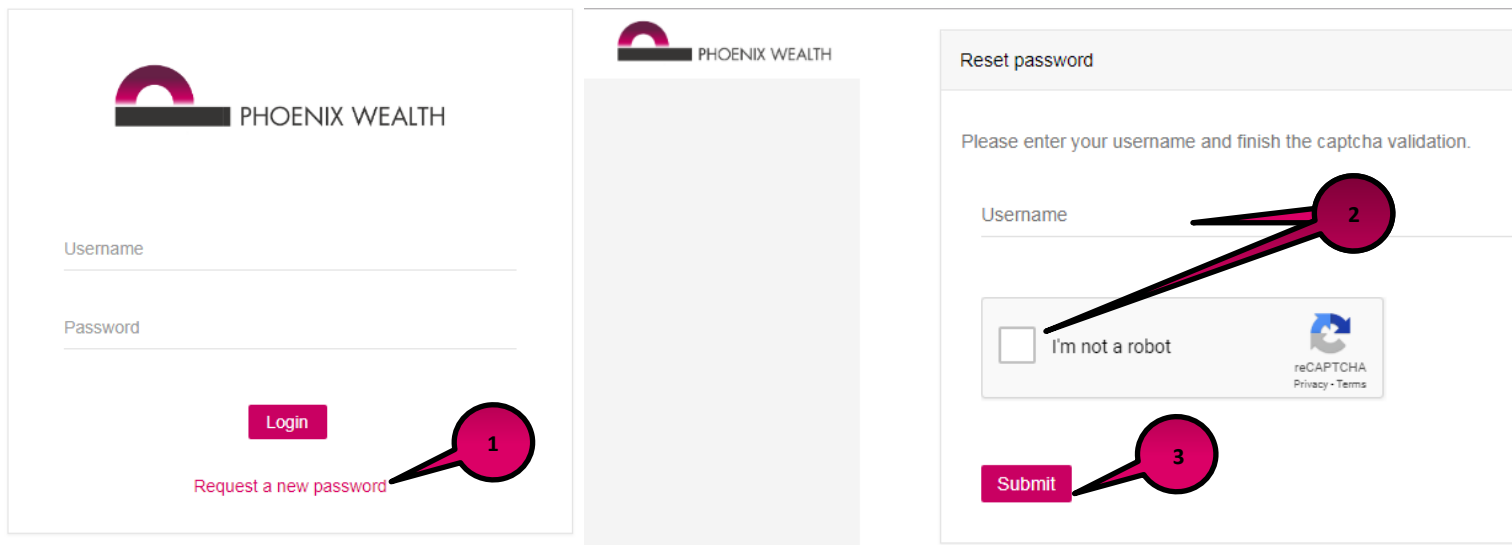
🕒 Password updated.

Forgotten password

If you've forgotten your password and can't login, you'll be able to reset it yourself following the steps below but only if you set your memorable phrase and security question answers (as explained on page 8):

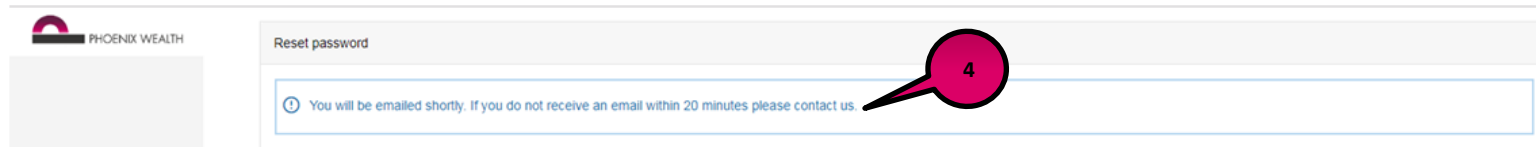
1. Click on 'Request a new password'.
2. Enter your username, tick box and complete the Captcha.
3. Once the Captcha verification is complete, click 'Submit'.

Otherwise you'll need to email us at phoenix-access@sipp-phoenixwealth.co.uk We'll get back to you as soon as possible, but at busy times it could take three to five business days.

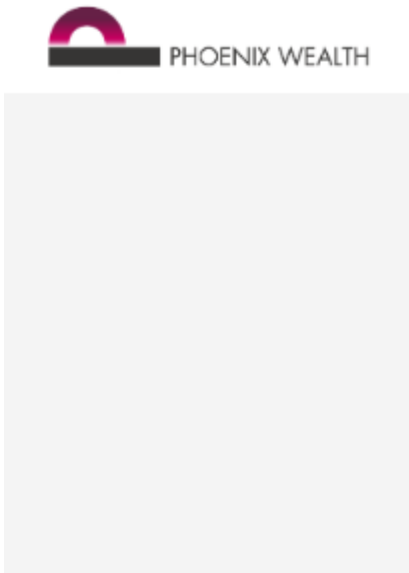


The image displays two screenshots of the Phoenix Wealth web interface. The left screenshot shows the login page with fields for 'Username' and 'Password', a 'Login' button, and a 'Request a new password' link. A red callout bubble with the number '1' points to the 'Request a new password' link. The right screenshot shows the 'Reset password' page, which includes the instruction 'Please enter your username and finish the captcha validation.' Below this are a 'Username' input field, a checkbox labeled 'I'm not a robot' with a reCAPTCHA logo, and a 'Submit' button. Red callout bubbles with numbers '2' and '3' point to the 'Username' field and the 'Submit' button, respectively.

A message will appear confirming you'll be emailed shortly. The email will contain a password link to reset your password. If you don't receive an email within 20 minutes, please email us at phoenix-access@sipp-phoenixwealth.co.uk and we'll get back to you as soon as possible.



Please note, as part of setting your new password, you'll need to confirm certain letters of your memorable phrase for security purposes.



Change Password

Your password must be at least eight characters long and must contain at least one upper case character, one lower case character, and one number.

New Password:

Confirm New Password:


Please enter characters 1, 2 and 5 from your memorable word:


1 2 5


Save


Navigating your new login


When logging in for the first time, you'll be presented with terms and conditions that you'll need to accept by pressing 'Submit'.


 PHOENIX WEALTH



 Dashboard

 Existing Accounts

 Customer

 Admin

Terms and Conditions

Important legal notice

These are the terms and conditions which apply to your use of this website. Use of our site includes accessing, browsing, or registering to use our site. Any reference in these terms and conditions to this website shall include password-protected services available through this website. Please read them carefully before you start to use this site. By proceeding with access to this website you are deemed to have accepted these terms and conditions and that you agree to comply with them. If you do not agree with these terms and conditions, then please refrain from using this website.

Phoenix Wealth reserves the right at its discretion to amend, update, modify or replace these terms and conditions at any time without notice. Any such amendment, update, modification or replacement shall be effective once the revised terms and conditions have been posted on this website. You are responsible for checking the terms and conditions of this website each time you use this website as you are bound by these terms and conditions and your use of this website indicates your acceptance of the terms and conditions applicable at the time you access the website.

These terms and conditions were last updated on 28 October 2019.

Please note that this website is intended for use by residents of the United Kingdom whilst in the United Kingdom only. It is not applicable to residents/ investors in other countries because the law in other countries may restrict the distribution of the information and products on this website.

- The adviser holds a current OSIS Individual Certificate;
- The adviser's Digital Certificate is verified against the Digital Certificate Revocation List;
- Phoenix Wealth accepts no responsibility for the authenticity of the Digital Certificate.

The adviser shall pay the costs and expenses incurred by it in obtaining and renewing its Digital Certificates.

Submit

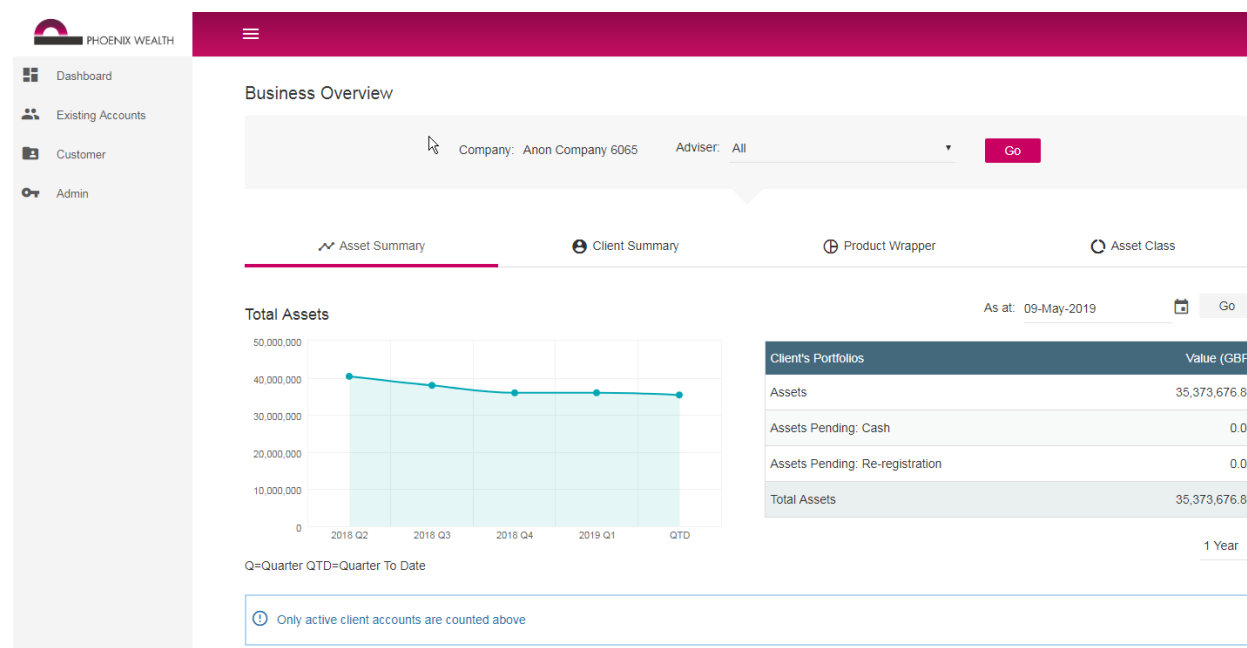
Do not submit

Homepage - advisers

Once you've accepted the terms and conditions you'll be automatically directed to your Homepage, which is the 'Dashboard screen'. This screen can also be access at any time whenever you click on the 'Dashboard' option on the left.

You'll find most of the navigation on the left. If this isn't displaying, click the three stacked bars on the top left of your screen.

The 'Dashboard screen' will give you a Business Overview and information about your customers.



You can view all the client records you have access to via the Existing Accounts – Search screen.

Click on 'Search', this will return a list of all clients you have access to.

Dashboard

Existing Accounts

Search

Customer

Admin

Account search

Search

Advanced Search

By Investment

Search criteria

Platform Provider

PHX

▼

Account Holder First Name:

Enter Account Number:

Account Holder Surname:

Select Adviser:

All

▼

Account status:

All

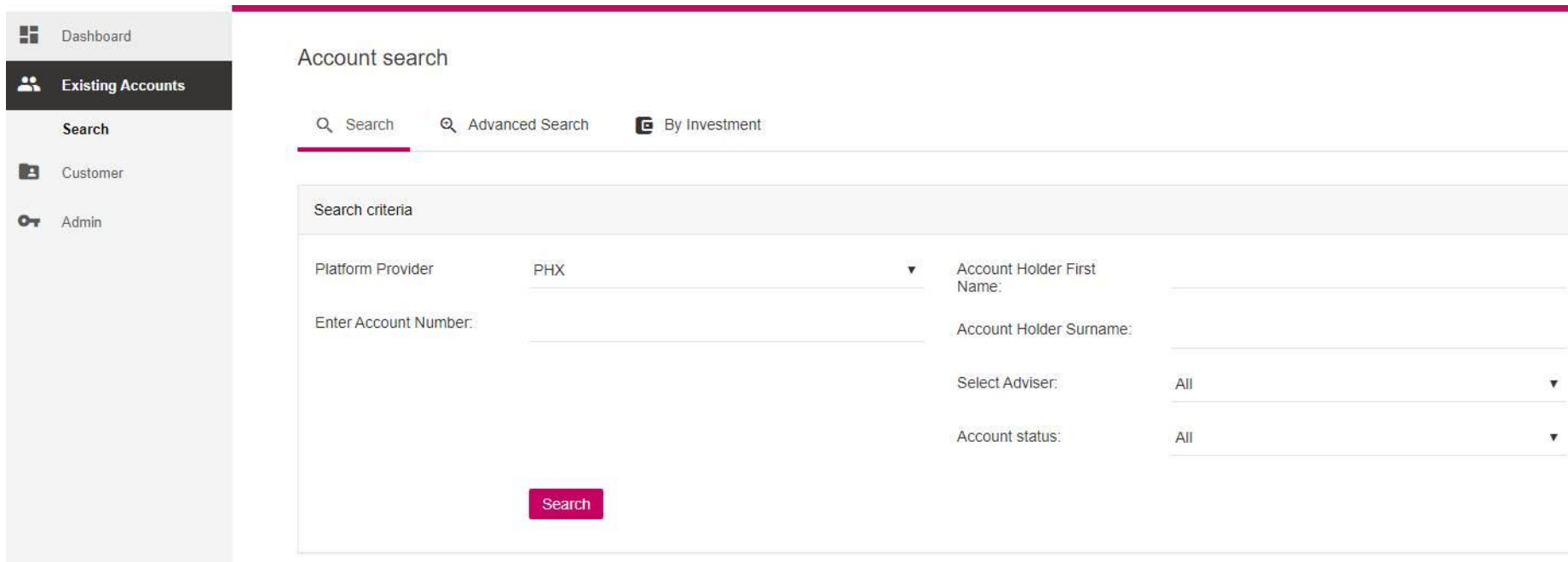
▼

Search

Homepage – Paraplanners, administrators, etc.

Once you've accepted the terms and conditions you'll be automatically directed to your Homepage, which is the 'Existing Accounts - Search screen'.

You'll find most of the navigation on the left. If this isn't displaying, click the three stacked bars on the top left of your screen.



Dashboard

Existing Accounts

Search

Customer

Admin

Account search

Search Advanced Search By Investment

Search criteria

Platform Provider PHX Account Holder First Name:

Enter Account Number: Account Holder Surname:

Select Adviser: All

Account status: All

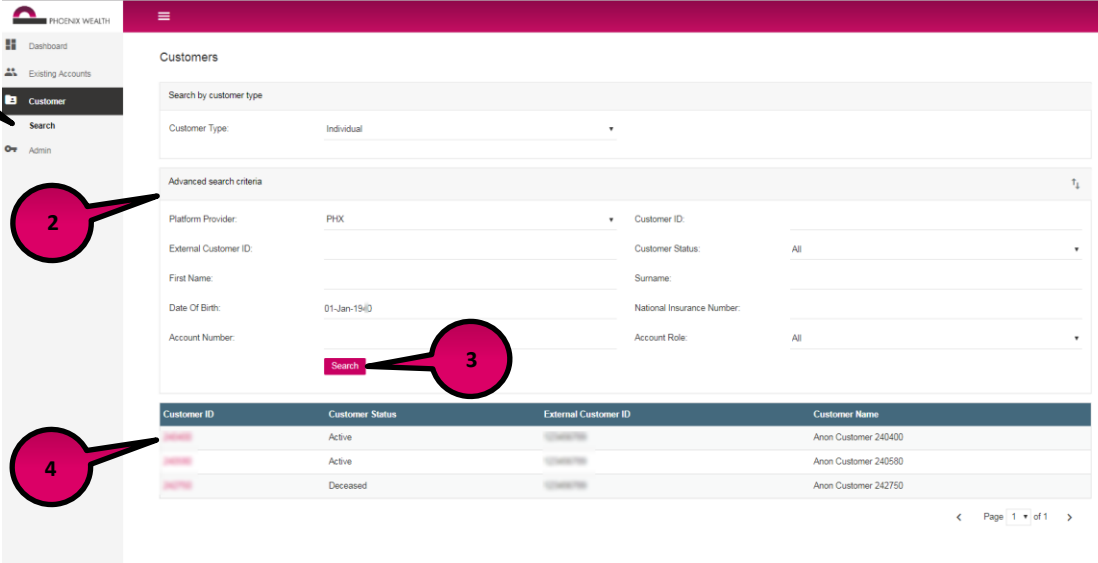
Search

You can view all the client records you have access to via your Homepage – Account Search.

Click 'Search', this will return a list of all clients you have access to.

The Customer search screen

Using the 'Customer search' screen you can search for customers using their identity information if you're unsure of their account number.



The screenshot shows the Phoenix Wealth 'Customers' search interface. Callout 1 points to the 'Customer' menu item in the left sidebar. Callout 2 points to the 'Advanced search criteria' section. Callout 3 points to the 'Search' button. Callout 4 points to the 'Customer ID' column in the search results table.

Customer ID	Customer Status	External Customer ID	Customer Name
XXXXXX	Active	XXXXXX	Anon Customer 240400
XXXXXX	Active	XXXXXX	Anon Customer 240580
XXXXXX	Deceased	XXXXXX	Anon Customer 242750

1. Click on the 'Customer' option. Then click on 'Search'.
2. Enter the customer details into the 'Advanced search criteria' section.
3. Click on 'Search'.
4. Once the search results appear click on the 'Customer ID' of the relevant customer.
5. This will now bring up a 'Customer Summary' page.
6. Click on the 'Account ID' to access the customer's account.

Customer Summary

Customer ID: 240400
Title: Mrs
First Name: Anon
Surname: Customer 240400

Customer Accounts

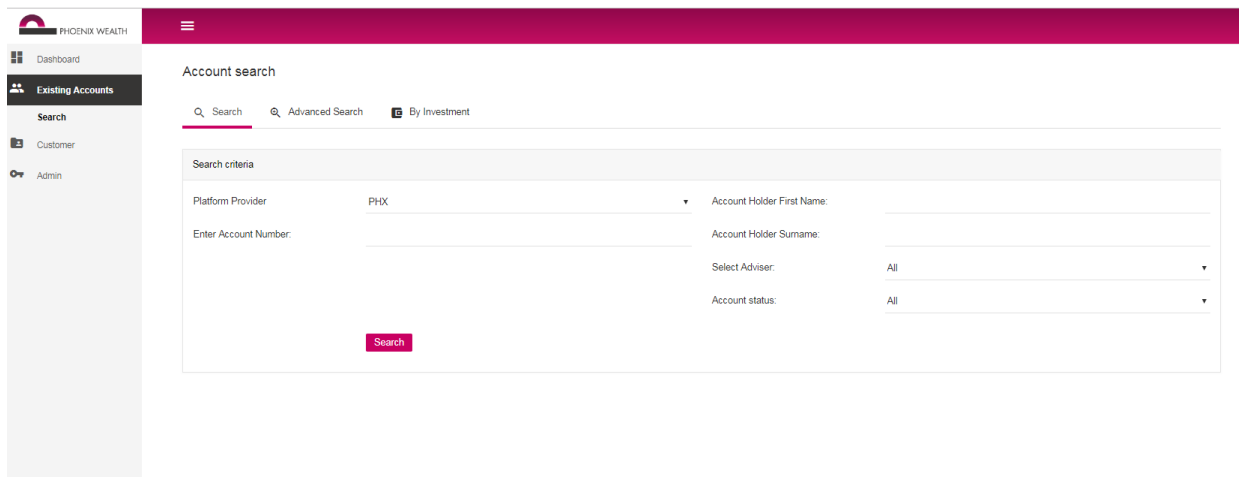
CIAccountID	Account Status	Account Role
	Active	Individual Account Holder

The Existing Account search screen

If you know the customer's account number click the search icon in the top right of the screen and input the policy number



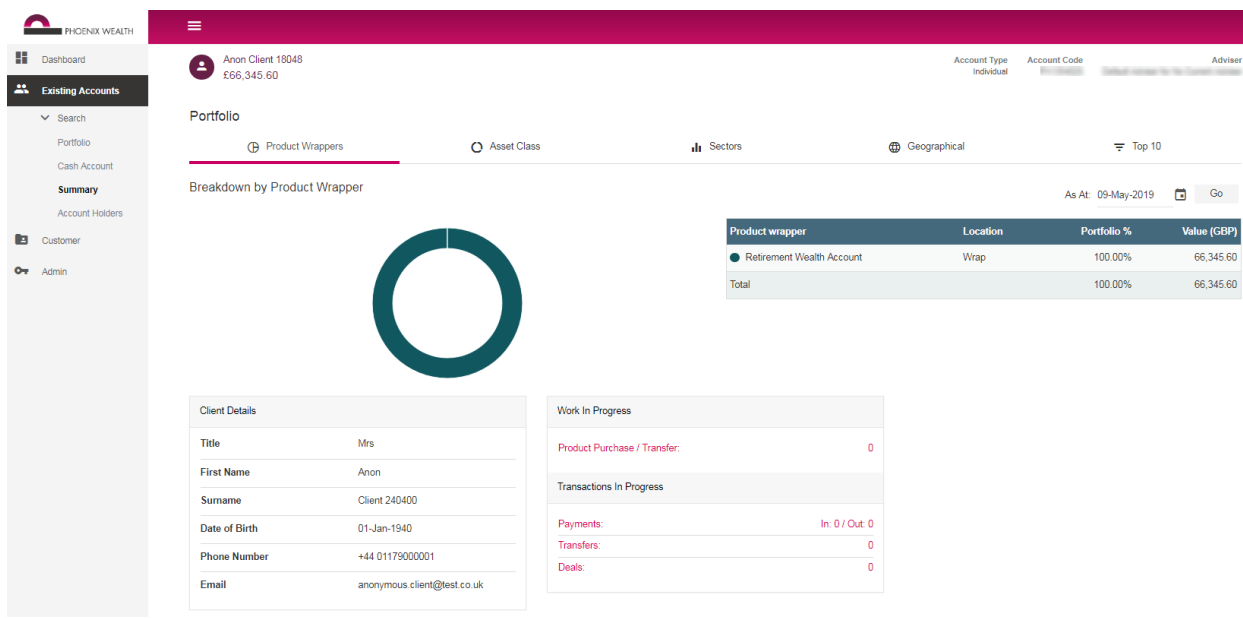
You can also go to the 'Existing Accounts' screen and search for the customer here if you know the account number. This will bring you directly to the customer's account.



Customer Account view - summary

Once you've located your customer you'll be brought to the account 'Summary' page. As you can see on the screen shot, this will confirm various details regarding your customer and their product wrappers.

There are five sub sections within the summary page you can view: Product Wrappers, Asset Class, Sectors, Geographical and Top 10.



Phoenix Wealth

Dashboard | Existing Accounts | Search | Portfolio | Cash Account | **Summary** | Account Holders | Customer | Admin

Anon Client 18048
£66,345.60

Account Type: Individual | Account Code: [REDACTED] | Adviser: [REDACTED]

Portfolio

Product Wrappers | Asset Class | Sectors | Geographical | Top 10

Breakdown by Product Wrapper

As At: 09-May-2019 | Go

Product wrapper	Location	Portfolio %	Value (GBP)
Retirement Wealth Account	Wrap	100.00%	66,345.60
Total		100.00%	66,345.60

Client Details


Title	Mrs
First Name	Anon
Surname	Client 240400
Date of Birth	01-Jan-1940
Phone Number	+44 01179000001
Email	anonymous.client@test.co.uk

Work In Progress

Product Purchase / Transfer:	0
Transactions In Progress	
Payments:	In: 0 / Out: 0
Transfers:	0
Deals:	0

Customer Account view - Portfolio

If you'd like more information on what your customer is invested in you can click on the 'Portfolio' option. This will give you a detailed breakdown of your customer's investment holdings.

 PHOENIX WEALTH

Dashboard

Investments

Existing Accounts

Search

Portfolio

Cash Account

Summary

Account Holders

Customer

Admin

Anon Client 18048

£66,345.60

Account Type

Individual

Account Code

Adviser

Include External Assets:

Yes

Wrap View

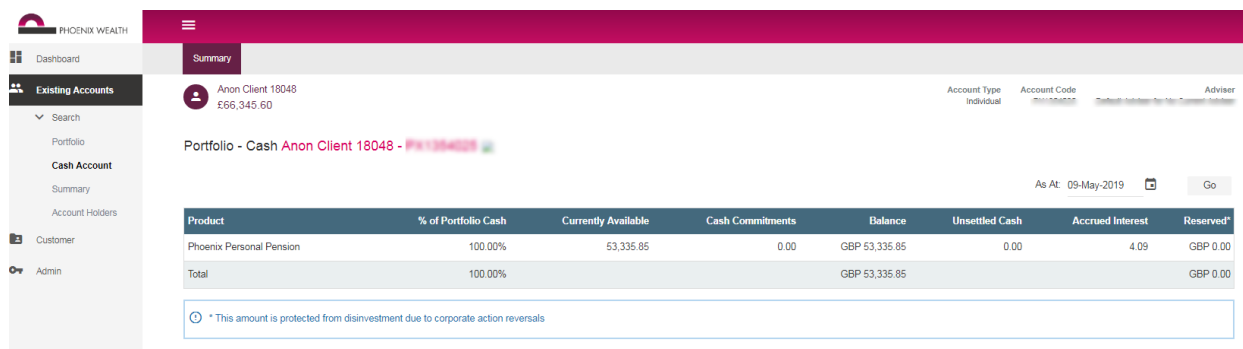
09-May-2019

Go

Investment	Documentation	Location	Quantity	Price	Market Value	Market Value (%)	Avg Cost	Total Cost	Protect from automatic disinvestment to cover fees etc
Wrap View				GBP 66,345.60	100.00%		GBP 53,335.85		
⊖ Cash					GBP 53,335.85	80.39%		GBP 53,335.85	
GBP Cash		Phoenix	53,335.8500	GBP 1.0000	GBP 53,335.85	80.39%	GBP 1.00	GBP 53,335.85	
⊖ Other					GBP 13,009.75	19.61%		GBP 0.00	
Utmost Wealth Evolution Bond		Phoenix	0.0911	GBP 142,821.4535	GBP 13,009.75	19.61%	GBP 0.00	GBP 0.00	

Customer Account view – Cash Account

If you'd like more information on the cash balance of your customer's account you can check the 'Cash Account' option.



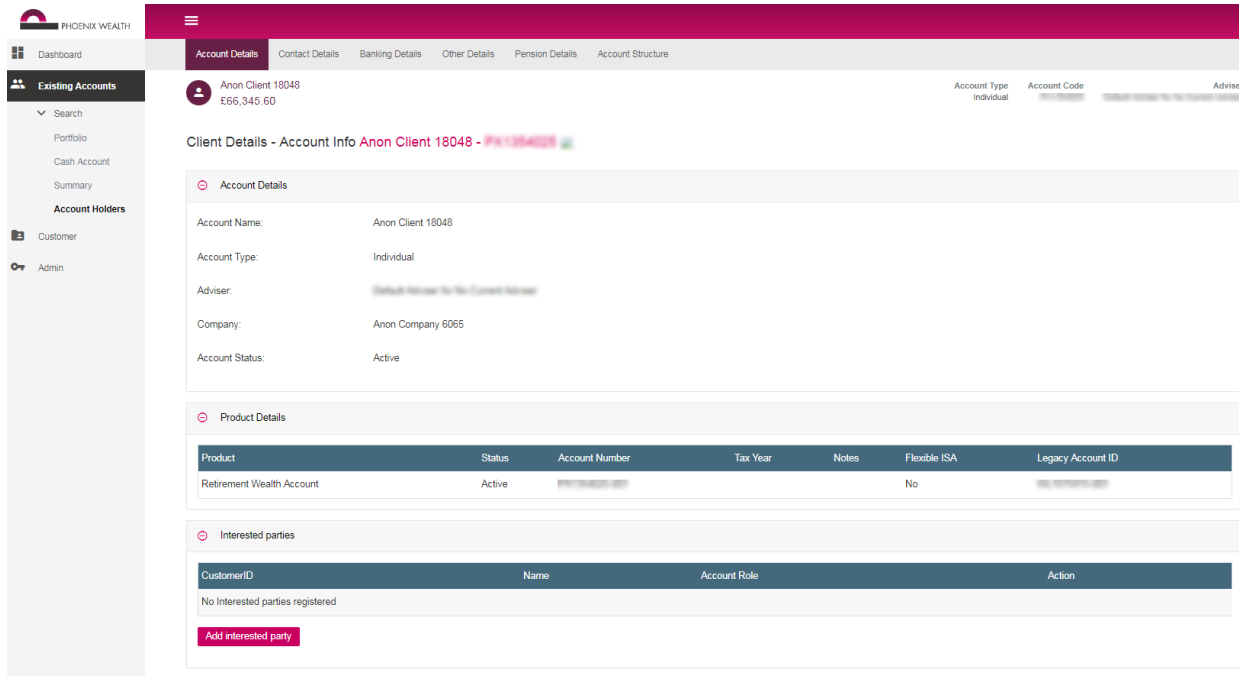
The screenshot shows the Phoenix Wealth interface. On the left is a navigation menu with options: Dashboard, Existing Accounts (selected), Search, Portfolio, Cash Account, Summary, Account Holders, Customer, and Admin. The main content area has a header bar with a hamburger menu icon. Below this, the account details for 'Anon Client 18048' are shown, including a balance of £66,345.60. The account type is 'Individual', the account code is 'PHW1804800', and the adviser is 'David Smith'. The portfolio is 'Cash Anon Client 18048 - PHW1804800'. The date 'As At: 09-May-2019' is displayed with a calendar icon and a 'Go' button. A table shows the portfolio details:

Product	% of Portfolio Cash	Currently Available	Cash Commitments	Balance	Unsettled Cash	Accrued Interest	Reserved*
Phoenix Personal Pension	100.00%	53,335.85	0.00	GBP 53,335.85	0.00	4.09	GBP 0.00
Total	100.00%			GBP 53,335.85			GBP 0.00

Below the table, a note states: '* This amount is protected from disinvestment due to corporate action reversals'.

Customer Account view – Account Holders

The 'Account Holders' section lets you access customer details like: product breakdowns, contact details, banking details and more.



The screenshot shows the 'Account Holders' section for a specific account. The left sidebar contains navigation options: Dashboard, Existing Accounts, Search, Portfolio, Cash Account, Summary, Account Holders (selected), Customer, and Admin. The main content area displays the following information:

- Account Summary:** Anon Client 18048, £66,345.60. Account Type: Individual. Account Code: [REDACTED]. Adviser: [REDACTED].
- Client Details - Account Info Anon Client 18048 - [REDACTED]**
- Account Details:**
 - Account Name: Anon Client 18048
 - Account Type: Individual
 - Adviser: [REDACTED]
 - Company: Anon Company 6065
 - Account Status: Active
- Product Details:**

Product	Status	Account Number	Tax Year	Notes	Flexible ISA	Legacy Account ID
Retirement Wealth Account	Active	[REDACTED]			No	[REDACTED]
- Interested parties:**

CustomerID	Name	Account Role	Action
No interested parties registered			

[Add interested party](#)

This initial page confirms some account and product details along with interested parties registered on the account.

Customer Account view – Account Holders – Contact Details

☰

Account Details
Contact Details
Banking Details
Other Details
Pension Details
Account Structure

Anon Client 18048
£66,345.60

Account Type
Individual
Account Code
123456789
Adviser

Addresses

Residential address

Line 1

1 Test Road

Line 2

Line 3

Test Town

Line 4

Testville

Line 5

Line 6

Postcode

TE1 5ST

Country

UK

Postal address

Line 1

1 Test Road

Line 2

Line 3

Test Town

Line 4

Testville

Line 5

Line 6

Postcode

TE1 5ST

Country

UK

Contact Information

Preferred Phone Number

+44 01179000001

Alternative Phone Number

Email Address

anonymous.client@test.co.uk

Contact Preferences

Allowed Contact Methods

Email

Yes

Phone

Yes

Mail

Yes

Preferred Contact Method

E-mail

Is Correspondence Recipient

No

Customer User Access

Customer User Access

No Access

The 'Contact Details' tab confirms the registered contact details for the customer.

Customer Account View – Account Holders – Banking Details

Account Details

Contact Details

Banking Details

Other Details

Pension Details

Account Structure

Anon Client 18048

£66,345.60

Account Type

Individual

Account Code

Adviser

Banking Details Anon Client 18048

Bank Accounts

Bank Account History

BANK ACCOUNT 1

Owner:

Individual

Country:

UK

Account Name:

Test Bank Account

Account Number:

Sort Code:

Building Society Roll Number:

Bank Name:

Money Bags Bank

Address Line 1:

1 Bank House

Address Line 2:

Bank Row

Address Line 3:

Bankville

Postcode:

AA1 1AA

Address Country:

UK

Direct Debit Instruction:

No

Nominated account for withdrawals:

Yes

The 'Banking Details' tab confirms the registered bank account details for the customer.

Customer Account View – Account Holders – Other Details

Account Details
Contact Details
Banking Details
Other Details
Pension Details
Account Structure

Anon Client 18048
£66,345.60

Account Type
Individual
Account Code
Adviser

Other Details Anon Client 18048 - PH1134625

Documentation

Terms & Conditions Agreed And Received:

Yes

Adviser Charge Agreement (ACA):

Held

Other Pension Details

SLA used by benefits that commenced prior to 5/4/2006

0.00%

Dependant of a deceased pension scheme member

Yes

Dependant pension commenced on or after 6 April 2015

No

Deceased pension scheme member below age 75 as at date of death

Yes

Is this a BCE5c event?

No

Appropriateness Test

Appropriateness Test completed for Complex Direct Investments

Date of test completion:

Test result:

The 'Other Details' tablets you view miscellaneous information including regulatory information.

Customer Account View – Account Holders – Pension Details

Please note that any Expression of Wish details submitted before May 2018 are not available to view online.

Account Details

Contact Details

Banking Details

Other Details

Pension Details

Account Structure

Anon Client 18048

£66,345.60

Account Type

Individual

Account Code

Adviser

Pension Details Anon Client 18048 - PH11354625

Beneficiaries for SIPP

Do you want to setup an Expression of Wish?

No

Expression of Wish

Role	Name	Relationship	Proportion
None registered			

Employment Details

Relevant Earnings:

0.00

Selected Retirement Date*

31-Aug-2020

Pension Input Period*

Start Date	End Date
06-Apr-2019	05-Apr-2019

Drawdown End Date (for P45 issue):

Money Purchase Annual Allowance

Pension input period start date	Pension input period end date	MPAA rules triggered?	Generate Notification to account holder	What date did the MPAA rules begin to apply?	What triggered the MPAA rules?
06-Apr-2019	05-Apr-2019	No		N/A	N/A
	05-Apr-2019	No		N/A	N/A
06-Apr-2019	05-Apr-2019	No		N/A	N/A
03-May-2018	05-Apr-2019	No		N/A	N/A

The 'Pension Details' tab lets you view information on dependants/beneficiaries for the pension along with other pension specific information like Pension Input Periods (PIPs) and Money Purchase Annual Allowance (MPAA) trigger information.

Customer Account View – Account Holders – Account Structure

<div> <div></div> <div>Account Details</div> <div>Contact Details</div> <div>Banking Details</div> <div>Other Details</div> <div>Pension Details</div> <div>Account Structure</div> </div>							
<div> <div></div> <div>Anon Client 18048</div> <div>£66,345.60</div> </div>				Account Type	Account Code	Adviser	
				Individual	180480000	Select Advisor for this Account Holder	
Product wrapper	Arrangement Type	Pre-A-Day portion	Identifier	Arrangement Value	Arrangement %	Date opened	Date closed
Retirement Wealth Account	Accumulation		Accumulation	727.17	1.10%	22-Apr-2018	
	Crystallised - Capped	0.00%	Capped 532458992	65618.43	98.90%	22-Apr-2018	

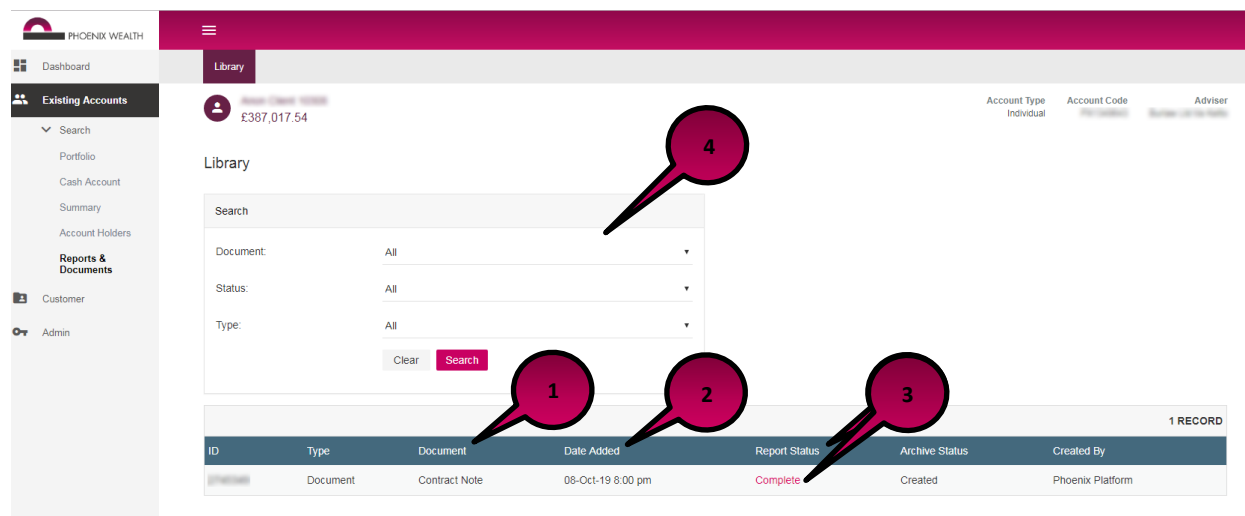
HMRC Arrangements

The 'Account Structure' tab confirms the breakdown of any accumulation, flexi-access drawdown and capped drawdown arrangements held by the customer.

Customer Account View – Reports & Documents

If you'd like to check for key documents produced for your customer's account you can check this under the 'Reports & Documents' section once you're in a customer's account. The documents available online are:

- Illustrations
- Portfolio Valuation
- Client transaction listing
- Contract Notes



The screenshot shows the 'Library' section of the Phoenix Wealth interface. At the top, there's a search bar and a 'Search' button. Below this is a table with columns: ID, Type, Document, Date Added, Report Status, Archive Status, and Created By. A single record is displayed with the following details:

ID	Type	Document	Date Added	Report Status	Archive Status	Created By
	Document	Contract Note	08-Oct-19 8:00 pm	Complete	Created	Phoenix Platform

Numbered callouts indicate the following features:

- 1: Points to the 'Document' column header.
- 2: Points to the 'Date Added' column header.
- 3: Points to the 'Report Status' column header.
- 4: Points to the search filter dropdowns (Document, Status, Type).

Under 'Document' (1) it will state the type of document.

Under 'Date Added' (2), it will state the date it was generated.

Under 'Report status' (3), it will state 'Complete' with a hyperlink you can use to open the document. The library will only display complete documents.

Under the search tool (4) you can search for a particular document by 'Document', 'Status' and 'Type'.