

YOUR FUTURE SIPP

Getting set up
on the portal

How to guide

Your future, our focus.

curtisbanks.co.uk



Getting set up on the Your Future SIPP portal

Registering

To register for the Your Future SIPP portal, you will need to visit www.curtisbanks.co.uk and click the secure portal log in button, located in the top right corner.



You will then need to click the log in button below the Your Future SIPP option as shown in the example below and then select adviser registration. This will allow you to begin the registration process by filling in the necessary information as required.

YOUR FUTURE SIPP
and Suffolk Life SIPPs

Our online portal for Advisers and Clients with our 'Your Future SIPP' and Suffolk Life products.

Login to the YFS and Suffolk Life Portal

Advisers and Clients with previous Suffolk Life portal access should also log in to the Your Future SIPP portal.

If this is the first time you have logged in to Your Future SIPP portal, simply login with your Suffolk Life details and for security reasons you will be prompted to change your password for future access.

For advisers, new registrations for portal access will take up to 1 working day to process and you will receive confirmation once your account has been activated. When creating a User ID, please do not use your email address as your User ID as this must be limited to 30 characters maximum. Please do not try and log in before your confirmation is received.

Clients looking to register for portal access should contact us to request an account.

CURTIS BANKS SIPP
and any other Curtis Banks products

Users who have other Curtis Banks products should continue to log in via the Curtis Banks portal.

Login to the Curtis Banks Portal

Advisers and Clients are automatically registered for the Curtis Banks portal. Log in details were issued by us via letter when you were first established on our records.

If you're unsure of your username, please contact us and we will arrange for this to be re-issued. For security reasons, this must be issued in the post.

If you're unsure of your password, please click on the forgotten password link, and follow the steps for this to be reset.

For Advisers, to add additional users (such as administrators) we require a Director or Partner of the firm to email instructing us to establish an additional login, detailing which specific IFA's client list they want this user to see.

CURTIS BANKS HOME

USER REGISTRATION

ABOUT YOU

Please check your firm details. If incorrect, please contact SIPP Support on 01473 296969.

Username *
Please enter your username

Firm Name *

Firm FCA No. *

Individual FCA No.

Title *

First name *

Surname *

Address Line 1 *

Address Line 2

Town *

County *

Post Code *

Phone *

Email *

NEXT

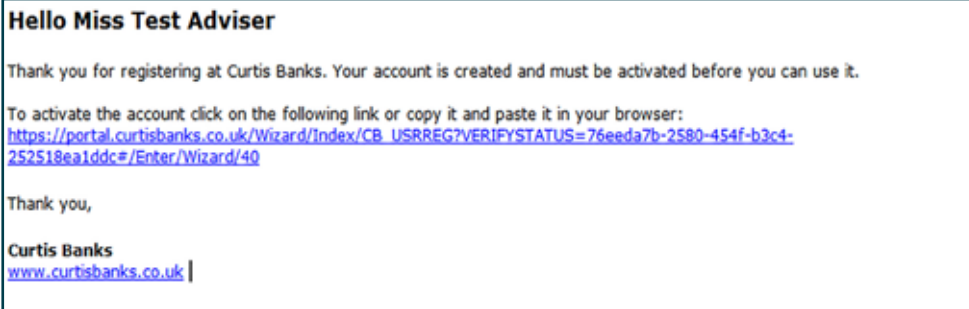
Once you have entered your details, create a username* and enter a personal email address, for example: firstname.surname@companyname.com.

*Your username must contain fewer than 30 characters - if your email address contains more than 30 characters please do not use this as your username.

Please note: You must enter a personal email address rather than a shared inbox address (such as info@companyname.com) to access the Your Future SIPP portal. Two users cannot share the same email address - your registration details are personal to you and should not be shared.

Verifying your account

You will then receive a verification email to the email address you entered on the Your Future SIPP portal registration page. This email will contain a link which you will need to click in order to verify the email address you have registered with.



Once you have verified your account, you will receive an email from our Business Development Executive team to confirm your email address has been verified. Please note this can take up to 1 working day to action.

Once you have received notification of your account being ready to use, you will then be able to log in to the Your Future SIPP portal's login page: portal.curtisbanks.co.uk.

If you have any queries regarding how to get set up on the Your Future SIPP portal, please contact our Business Development Executive team on 01473 296 975 or email businessdevelopmentexecutives@nucleusfinancial.com.

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0370 414 7000, or via the Typetalk service on 18001 0370 414 7000.

Curtis Banks Pensions,
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Ipswich, IP1 1QJ

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Call charges will vary. We may record and monitor calls.

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