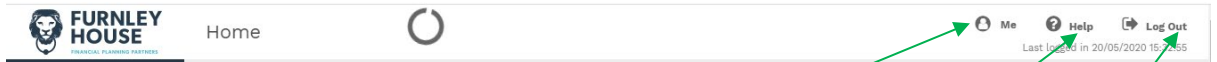


How to use the Moneyinfo portal

This document gives you an overview of how the Moneyinfo portal can be accessed and where you can find relevant information.

Log in: <https://furnleyhouse.moneyinfo.co.uk/> - you will initially get sent your log in details via email once they are generated. Once you have set this up you will continue to log in through the link above.

Once you have logged in you will see this screen:

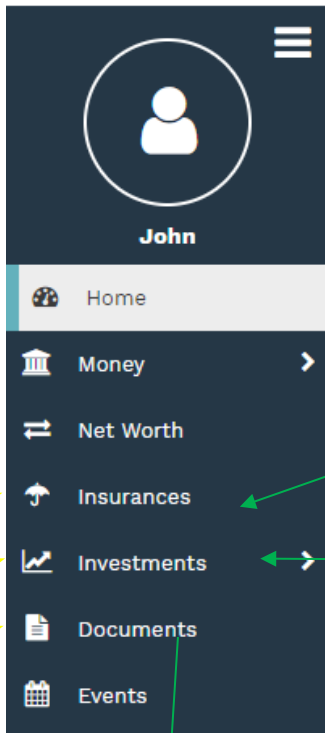


Here is where you can change your profile, add financial information that is not already showing if you wish.

Help provides guidance on customising your dashboard.

Logging out will take you back to the log in page.

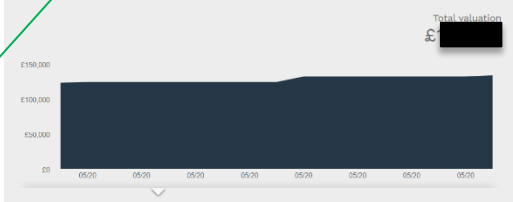
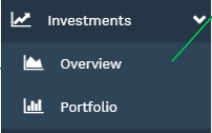
Along the left-hand side of your dashboard you will also see:



★ These 3 sections are the ones you will mostly use as this is where you will view your investments/ pensions to see their values and to see their growth/loss.

Here you will see an overview of all your investments together, this will show you the total valuation of all the investments you have on Moneyinfo.

Any protection policies you may have will be detailed here.



In this section you will be able to see detailed overview of your investments/pensions. You can then click into each of the investments you hold and this will show you details including your plan number, value of your plan, start date etc. Also, detailed in this section will be the funds your plan is invested in. the graph above will also be there however, this will be just show the performance of the portfolio you are invested in, not your whole portfolio.

★ ★ ★ All docs which have been uploaded onto the portal by yourself or Furnley House will be held here.

