
MY SUCCESSION WEALTH



SUCCESSION
WEALTH

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LOGGING INTO 'MY SUCCESSION WEALTH'

mysuccessionwealth.co.uk – shortened URL to make it easier to type into a web browser. This will take you to the site.

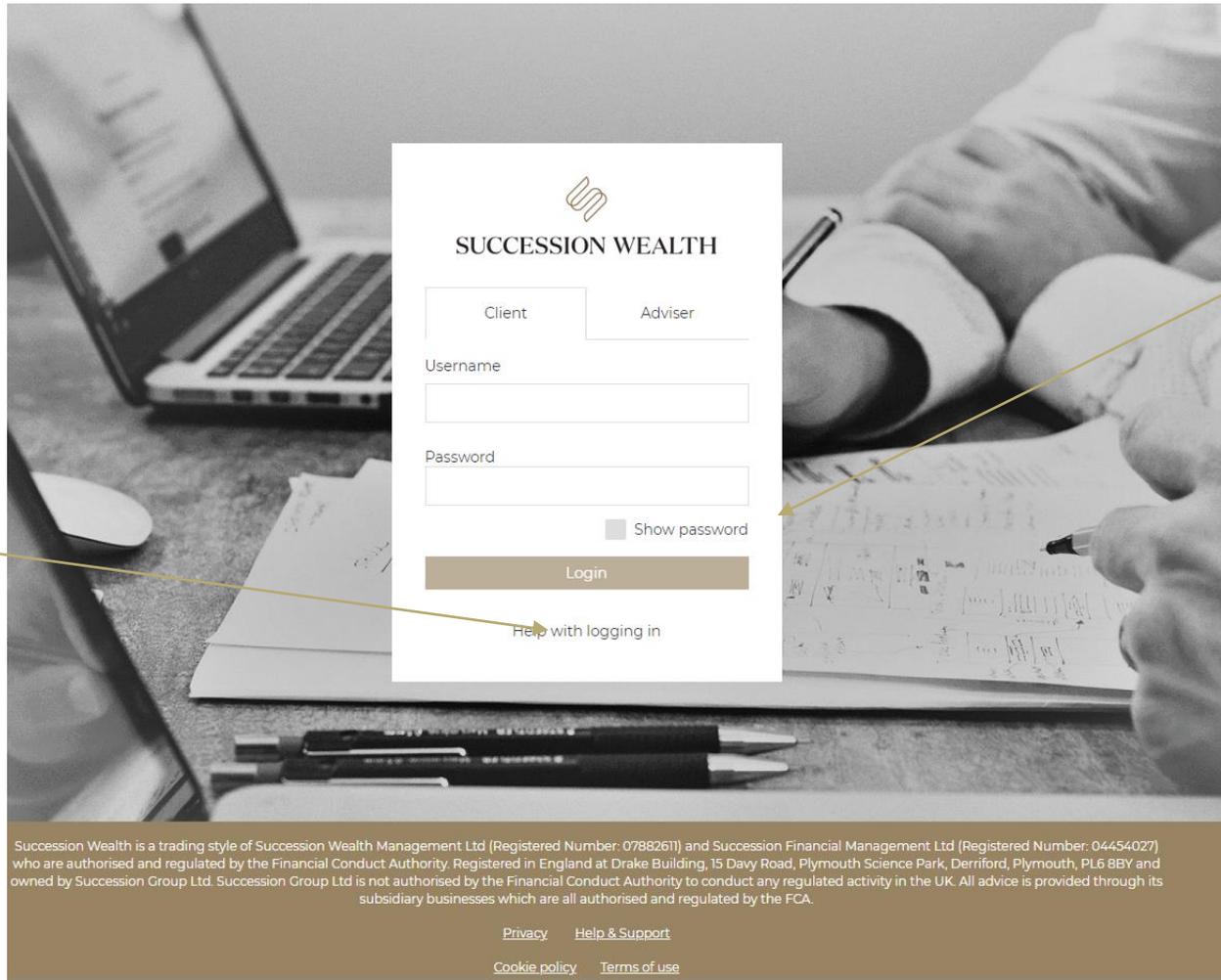
<https://succession.myfinance-hub.co.uk/login/> - the actual URL you should **always** see in the address bar when you are on the log in page of the site.



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LOG IN SCREEN

The log in screen requests the username and password provided by your Wealth Planner.



If you are having difficulty logging in click the 'Help with logging in' link. From here you can easily get a reminder of your username and password in just a few simple steps.

Click show password to reveal your password. This is handy if you aren't sure if you typed it correctly.

Click it again to hide it.

 Be careful using this feature in public where you could be observed. Please do not share your username and password to anyone.



HELP LOGGING IN

If you need help logging into your online account, we can provide you with a reminder of your username and a temporary password.

This feature will send a new 'temporary' password (you will be asked to change it) to you via e-mail if you have forgotten it. You will need to answer a number of questions based on the details you provided when you set your online profile up in order to complete this.

MY SUCCESSION WEALTH

Help logging in

Forgotten password
A temporary reset code will be sent to your registered email address

Username

[Send me a temporary reset code](#)

Forgotten username
Your registered email

Your date of birth (DD/MM/YYYY)

[Send me my username](#)

[Return to login](#)

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[Cookie policy](#) [Terms of use](#)

This feature sends a reminder of your username to the e-mail account associated with your online profile.



DIGITAL SIGNATURES



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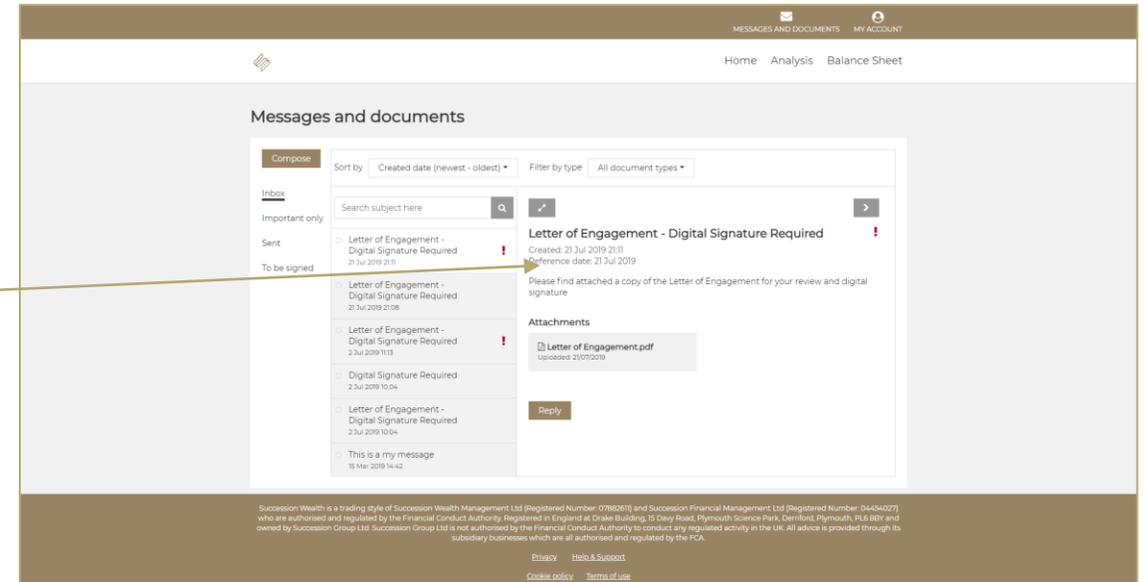
DIGITAL SIGNATURE STEPS – PT 1

Digital signatures allow us to send you documents that we would usually need to send by post or meet you in person to sign. This function provides flexibility, is quick, easy and secure.

The next 2 pages give you an overview of how the process works.

1. Your wealth planner will notify you that you have a Digital signature to sign.
2. Access 'My Succession Wealth' and navigate to the 'Messages and documents' section of the site. There you will find an e-mail in your inbox with details of any supporting documentation that you should read along side the Digital signature document.
3. Take your time to read this information before you sign as it is important.

Continues on the next page....

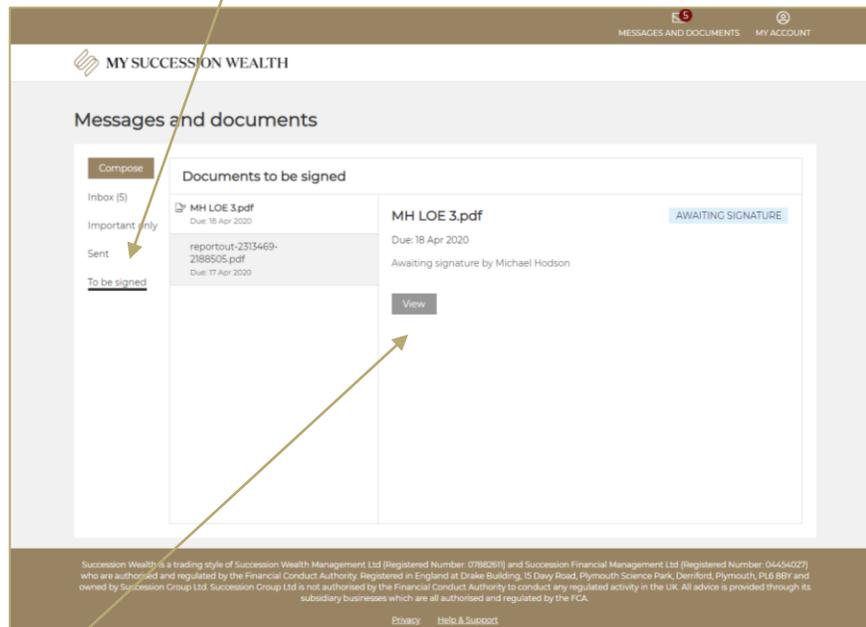


In mobile, opening PDF documents will take you to a separate tab in your browser. You will then need to navigate back to the website. After a certain amount of time you may need to log back in again.



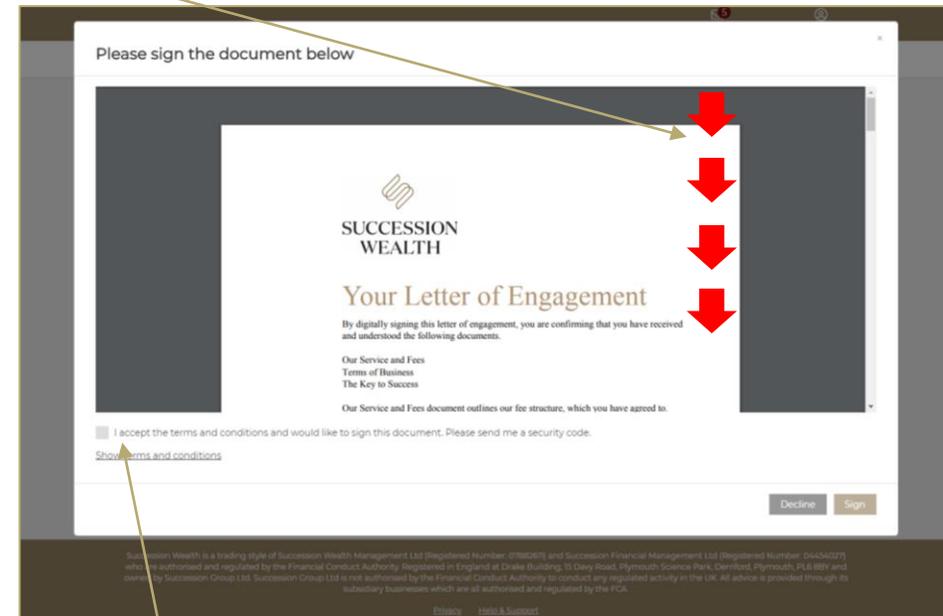
DIGITAL SIGNATURE STEPS – PT 2

4. Once you have read any supporting materials navigate to the **'To be signed'** section at the bottom of the menu.



5. Click the 'View' button.

6. Scroll through and read the document carefully.

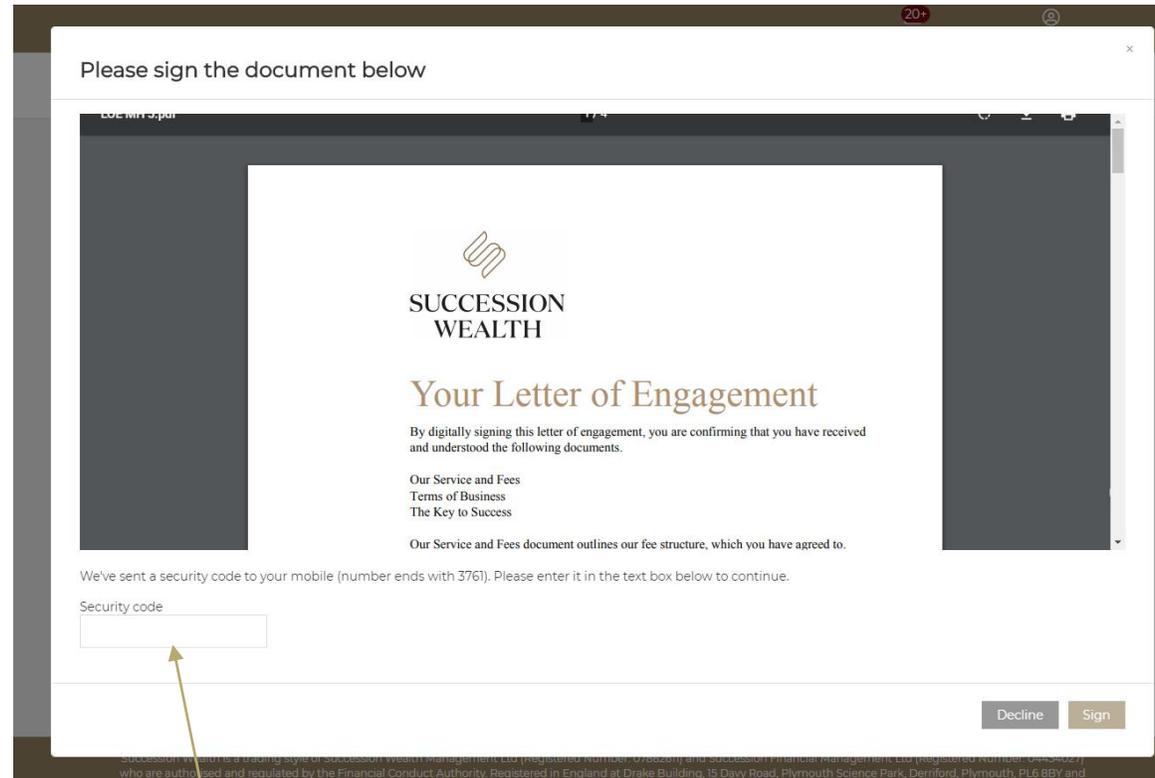
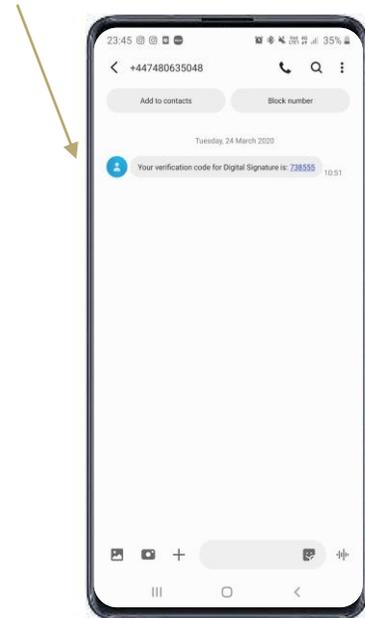


7. When you get to the bottom of the page you will see a box requesting you to digitally sign (agree to the document conditions) the document and to agree to the Digital signature terms and conditions (being a substitute for a normal handwritten signature). Once happy to proceed tick the box to agree to both.



DIGITAL SIGNATURE STEPS – PT 3

9. You will be sent a text message to the mobile phone number registered on your account.



10. Enter the code provided into the box displayed on 'My Succession Wealth' and click 'Sign'.

11. This will complete the digital signature process.

