Elevate help guide Getting started with online access

abrdn.com

Before you begin

- We'll email you your username and a link to set up your new Elevate password (which expires after 30 days – or once you click on the link).
- For security reasons, we'll email them to you separately. Once you've received both, you're ready to log on.
- If you have a joint Elevate account, you'll each receive separate log on details.
- If you have more than one Elevate account (for example a joint account with your partner and your own individual account), you'll receive separate log on details for each.

Username and Password

1. Click on the temporary link provided in the **Elevate password set up request** email, then enter and confirm your new password.
2. Once you've set up your password you'll be taken to the Elevate login page where you can enter your username and new password to view your account.

If the link to set up your new password has expired, you can go to the Elevate web address using the details below (or click 'Return to Login Page' on the expired link) then click **Forgotten your password** to request a new link that will be emailed to you.

Log on for the first time

3. **Accept our Terms and Conditions**
   The first time you login we'll ask you to complete a user declaration that we may ask you to review from time to time.
4. **Choose a memorable word or phrase**
   This will be used if you ever forget your password.

You're now ready to start using your Elevate account

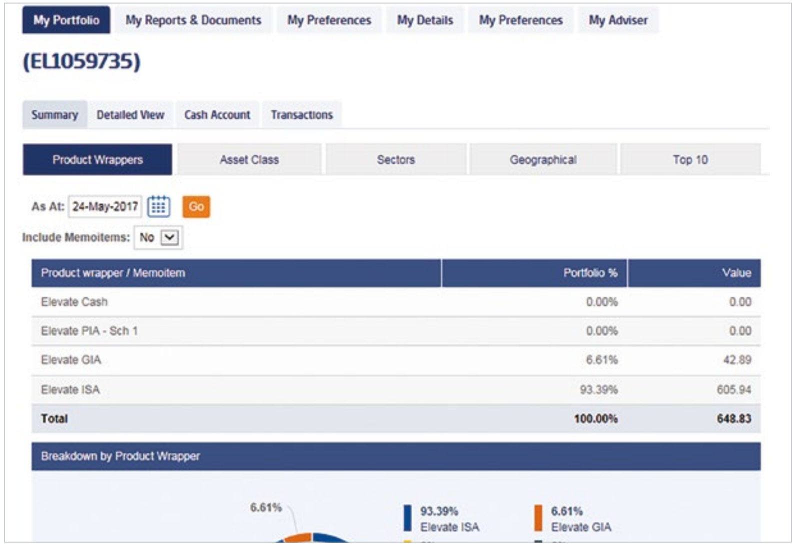
Note: When you first get online access, it may take a few days for everything to show on your Elevate account.

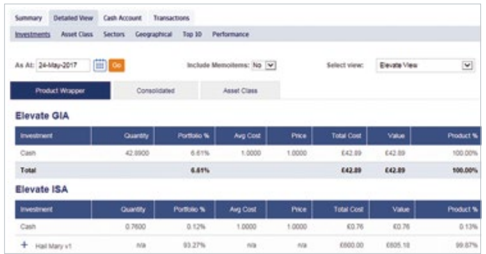
Useful tips

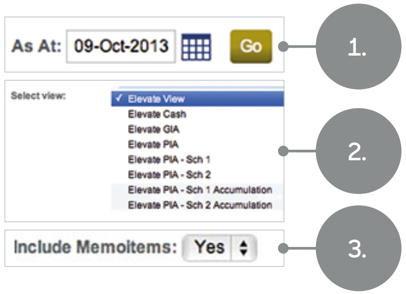
- The Elevate website address is **elevateplatform.co.uk**
- Save the address as a favourite in your web browser, so you can log on quickly each time.
- Your adviser may have a different website address for Elevate – you can use that one too.

Viewing your account online

What you will see







What you can do

Once logged on, you can:

- Keep track of your investments
- View your transaction reports and notices
- Check your contact details

My Portfolio

Summary

View the total value of cash and investments held in your product wrappers by selecting **Summary**.

Detailed view

You can personalise the way you view your investments by selecting **Detailed View**.

1. Select an '**As at**' date to see historic values.
2. Check how all your investments are performing by selecting '**Elevate View**' or view each product wrapper separately.
3. If you hold investments outside of Elevate, your adviser can record them on Elevate as '**Memoitems**'. You can include the value of these investments when you view your Elevate investments.

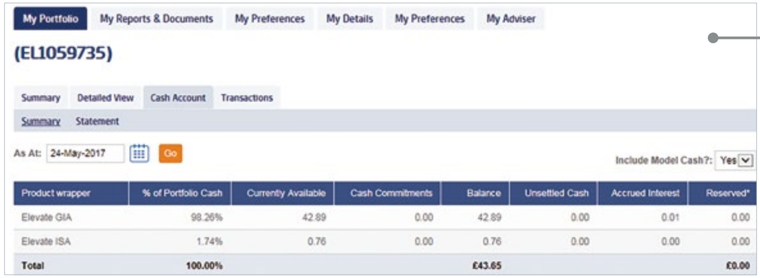
Notes

Product wrapper:

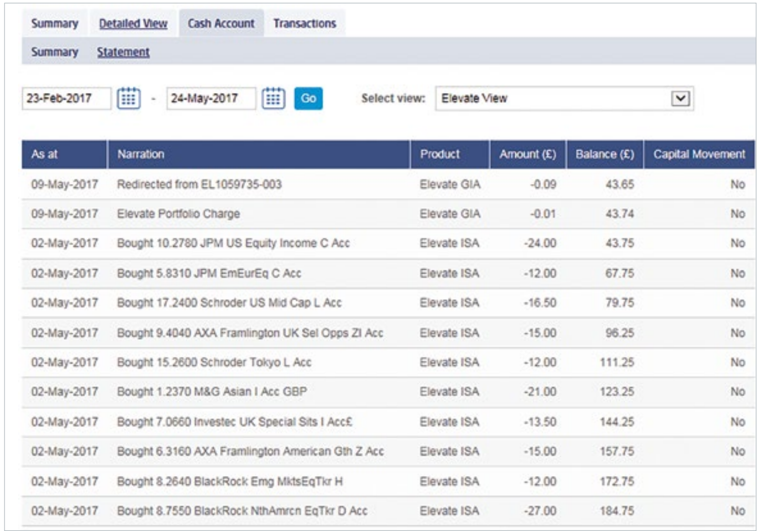
We use the term product wrapper when we're talking about the types of products you hold within your Elevate account. Our Elevate Cash Account, Elevate ISA, Elevate PIA and Elevate GIA are all product wrappers that will sit within your Elevate account if you choose to invest in them.

Cash balance statements

What you will see



Product wrapper	% of Portfolio Cash	Currently Available	Cash Commitments	Balance	Unsettled Cash	Accrued Interest	Reserved*
Elevate GIA	98.26%	42.89	0.00	42.89	0.00	0.01	0.00
Elevate ISA	1.74%	0.76	0.00	0.76	0.00	0.00	0.00
Total	**100.00%**			**£43.65**			**£0.00**



As at	Narration	Product	Amount (£)	Balance (£)	Capital Movement
09-May-2017	Redirected from EL1059735-003	Elevate GIA	-0.09	43.65	No
09-May-2017	Elevate Portfolio Charge	Elevate GIA	-0.01	43.74	No
02-May-2017	Bought 10.2780 JPM US Equity Income C Acc	Elevate ISA	-24.00	43.75	No
02-May-2017	Bought 5.8310 JPM EmEurEq C Acc	Elevate ISA	-12.00	67.75	No
02-May-2017	Bought 17.2400 Schroder US Mid Cap L Acc	Elevate ISA	-16.50	79.75	No
02-May-2017	Bought 9.4040 AXA Framlington UK Sel Opps ZI Acc	Elevate ISA	-15.00	96.25	No
02-May-2017	Bought 15.2600 Schroder Tokyo L Acc	Elevate ISA	-12.00	111.25	No
02-May-2017	Bought 1.2370 M&G Asian I Acc GBP	Elevate ISA	-21.00	123.25	No
02-May-2017	Bought 7.0660 Investec UK Special Sits I Acc£	Elevate ISA	-13.50	144.25	No
02-May-2017	Bought 6.3160 AXA Framlington American Gth Z Acc	Elevate ISA	-15.00	157.75	No
02-May-2017	Bought 8.2640 BlackRock Emg MktsEqTkr H	Elevate ISA	-12.00	172.75	No
02-May-2017	Bought 8.7550 BlackRock NthAmrcn EqTkr D Acc	Elevate ISA	-27.00	184.75	No

What you can do

Cash Account

Select **Cash Account > Summary** for an overview of your cash balances.

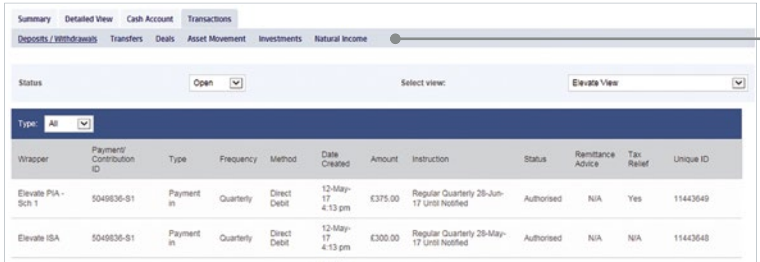
Select **Cash Account > Statement** to view your completed transactions, including payments in and out, any interest received or charges and tax that have been deducted.

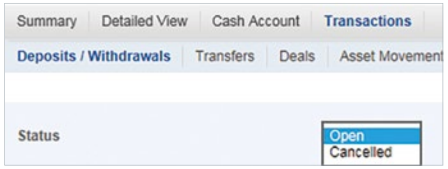
Notes

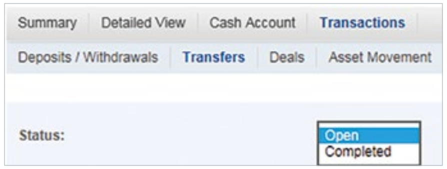
To view older payments select a date range.

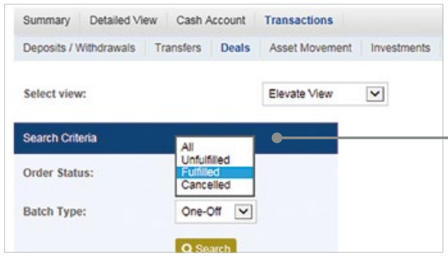
Recent account transactions

What you will see









1.

2.

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What you can do

Transactions

View your in-progress transactions and transfers and check regular payments that are set up to and from your Elevate account.

1. Look at your in-progress payments in or out by selecting **Transactions > Deposits / Withdrawals**.

2. Check the status of your transfers by selecting **Transaction > Transfers**.

3. View your in-progress (unfulfilled), completed (fulfilled) or investment transactions by selecting **Transactions > Deals**.

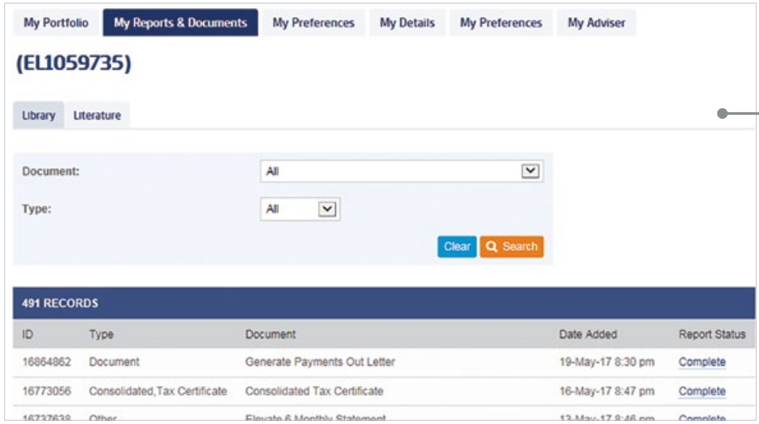
Notes

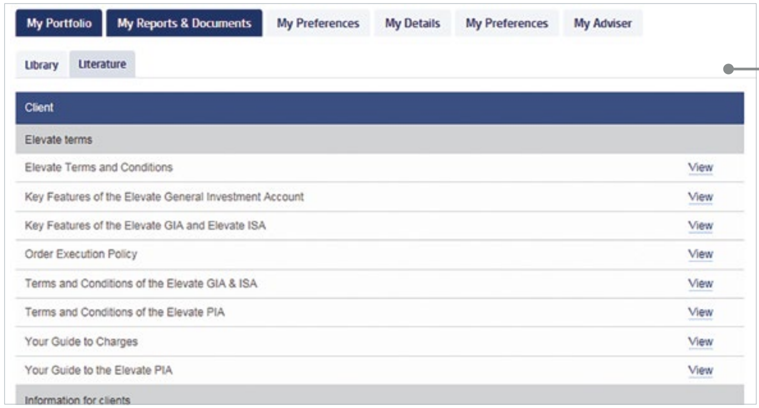
Completed payments will show on your **Cash Account > Statement**.

You can see the date and the number of units purchased or sold for single or regular investment transactions.

View documents and product literature

What you will see





What you can do

My Reports & Documents

Library

All of the documents we have sent to you in the post are stored online in your **Reports & Documents** library and can be viewed here.

Literature

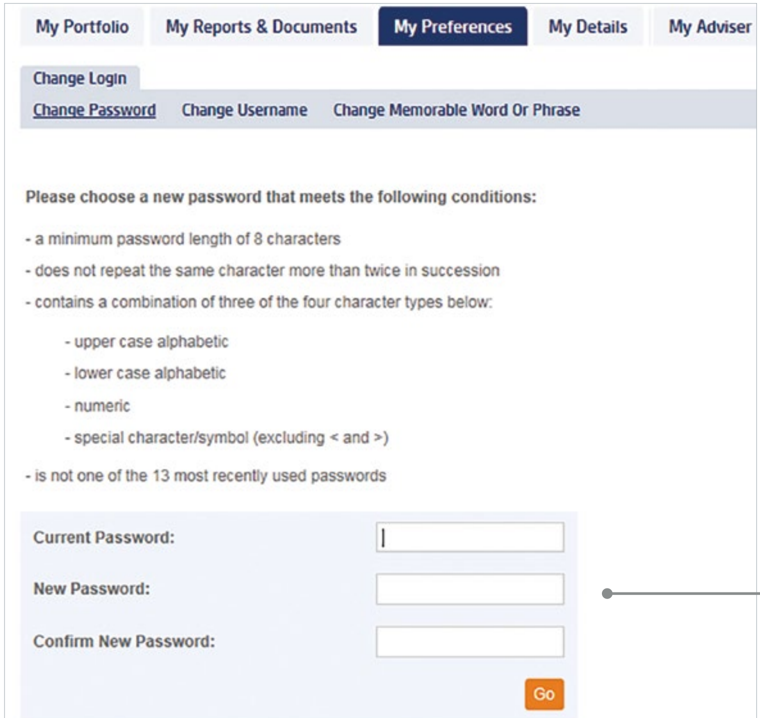
You can also see literature and information that we provide for our products by selecting **My Reports & Documents > Literature**.

Notes

You can choose to go paperless by editing the **Client Access** section under **My Details > Contact Details** or by speaking to your adviser. See page 8 of this guide.

Change login details

What you will see



What you can do

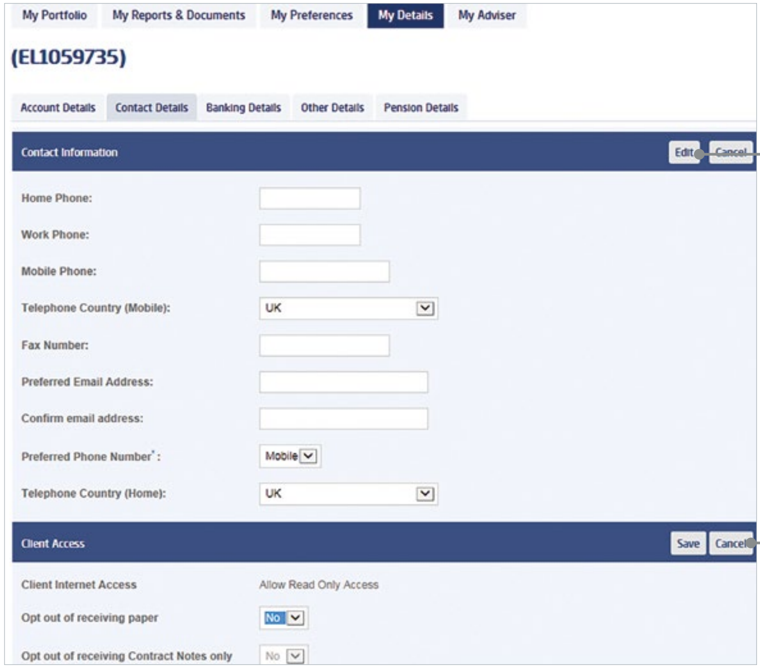
My Preferences

Change your username, password and memorable phrase at any time.

Notes

Update your contact details

What you will see



What you can do

My Details

Click **Edit** to update your email address, contact details and your preference for receiving paperwork in the post.

Contract Notes can be some of the most frequent documentation that we send to you because they are generated every time you buy or sell investments.

You may have the option to stop only our Contract Notes from being sent to you in the post by selecting **Opt out of receiving Contract Notes**. Speak to your adviser if this option is not available. This can be set up independently from your overall paperless preference so you can carry on receiving any other paperwork in the post if you choose – or go completely paperless by selecting **Opt out of receiving paper**.

Notes

Some changes can only be made by your adviser or us, such as a change to your home address and your bank account details.

If you choose to receive paperwork in the post, you will still be able to view these documents online.

If you've chosen to go paperless you will be sent an email notification whenever there is a new document available online. Some documents will continue to be sent in the post to you.

Get to know us better

Call us on 0345 600 2399

Our lines are open 9am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at Elevate_Enquiries@abrdn.com

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

Address

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For more information visit abrdn.com

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