

YOUR FUTURE SIPP

Getting set up
on the portal

How to guide

Your future, our focus.

curtisbanks.co.uk



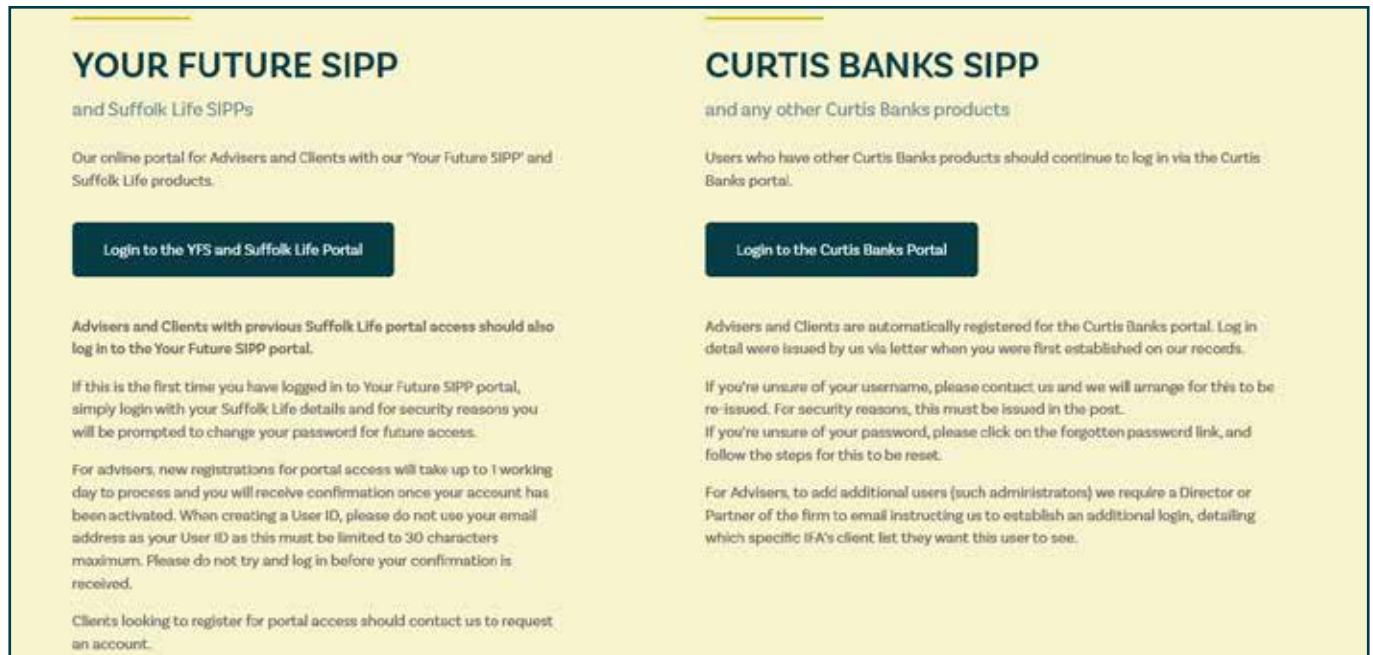
Getting set up on the Your Future SIPP portal

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.

The image shows the 'USER REGISTRATION' form on the Curtis Banks website. The form is titled 'USER REGISTRATION' and includes a sub-header 'ABOUT YOU'. It contains a message: 'Please check your firm details. If incorrect, please contact SIPP Support on 01473 296969.' The form has two columns of input fields. The left column includes: 'Username *' (with a placeholder 'Please enter your username'), 'Firm Name *', 'Firm FCA No. *', 'Individual FCA No.', 'Title *', 'First name *', and 'Surname *'. The right column includes: 'Address Line 1 *', 'Address Line 2', 'Town *', 'County *', 'Post Code *', 'Phone *', and 'Email *'. A 'NEXT' button is located at the bottom right of the form.

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.

Hello Miss Test Adviser

Thank you for registering at Curtis Banks. Your account is created and must be activated before you can use it.

To activate the account click on the following link or copy it and paste it in your browser:

https://portal.curtisbanks.co.uk/Wizard/Index/CB_USRREG?VERIFYSTATUS=76eeda7b-2580-454f-b3c4-252518ea1ddc#/Enter/Wizard/40

Thank you,

Curtis Banks

www.curtisbanks.co.uk |

Once you have verified your account, you will receive an email from our Sales Support 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 Sales Support team on 01473 296 975 or email salesupport@suffolklife.co.uk.

Curtis Banks Pensions,
153 Princes Street,
Ipswich, IP1 1QJ

T 0370 414 7000
F 0370 414 8000

curtisbanks.co.uk

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

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