

YOUR FUTURE SIPP

How to
use Secure
Messaging on
the portal

How to guide

Your future, our focus.

curtisbanks.co.uk



How to use Secure Messaging on the Your Future SIPP Portal


Adviser dashboard

Once you have logged into the Your Future SIPP Portal, Secure Messages will be one of the options to choose from on the Adviser Dashboard.

Accessing Secure Messages

When accessing your Secure Messages you will be presented with the default view of all your **Unread** messages. You can view your inbox, sent items, or all messages by changing the display option in the 'filtered by' drop down list.

All of your Secure Messages will contain a **Conversation Number** specific to each message thread.

 CURTIS BANKS

Logged in as (Adviser User2)

ADVISER DASHBOARD

BUSINESS SUMMARY

Company
2667

Branch
Sdchq

Total Investors
43


Total AUA
£20,844,913.44

APPLICATIONS


In Progress
0


Completed
0


Cancelled
0



DOWNLOAD MORE INFORMATION

 SIPP Application Form
PDF | 517kb

 SIPP Fee Schedule
PDF | 89kb

 SIPP Brochure
PDF | 5.2mb

SECURE MESSAGES

Filtered by: All

From	To	Conversation No.	Customer Name	Plan No.	Process	Date	Subject
C E Khdzysm Esq	New Business	SC0000000025			Submit new business forms	01/08/2018 00:00	xxx
C E Khdzysm Esq	New Business	SC0000000026			Submit new business forms	01/08/2018 00:00	xxx
C E Khdzysm Esq	New Business	SC0000000027			Submit new business forms	01/08/2018 00:00	xxx
C E Khdzysm Esq	New Business	SC0000000028			Submit new business forms	01/08/2018 00:00	xxx
C E Khdzysm Esq	New Business	SC0000000029			Submit new business forms	01/08/2018 00:00	xxx

Records 1 to 6 of 6 per page 10

NEW MESSAGE

Creating a new message

If you wish to create a new Secure Message in relation to a SIPP that has yet to be established, click the **New Message** button from the adviser dashboard.

SECURE MESSAGES

Filtered by: Sent

From	To	Conversation No.	Customer Name	Plan No.	Process	Date	Subject
C E Khdzysm Esq	New Business	SC0000000027			Submit new business forms	01/08/2018 00:00	xxx
C E Khdzysm Esq	New Business	SC0000000028			Submit new business forms	01/08/2018 00:00	xxx
C E Khdzysm Esq	New Business	SC0000000029			Submit new business forms	01/08/2018 00:00	xxx
C E Khdzysm Esq	New Business	SC0000000030			Submit new business forms	01/08/2018 00:00	xxx
C E Khdzysm Esq	Cash Movements	SC00000000208			Request an investment	27/11/2018 11:07	Purchase Curtis Banks shares

Records 1 to 7 of 7 per page 10

NEW MESSAGE

Creating a new message (continued)

If your message is in relation to an existing plan, locate the correct plan from your firms plan list and create a new message from the plan dashboard.

▼ PLAN SUMMARY

FUND VALUE: -£792.00

> MANAGE CASH

AVAILABLE CASH: £0.00

▼ SECURE MESSAGES

UNREAD: 0

Filtered By

Unread ▼

No messages for this plan

NEW MESSAGE

Once you have opened a new message, select the process that suits the purpose of your message. If your query does not relate to one of these processes, please call us on 01473 296 969 or email sippsupportteam@suffolklife.co.uk.

After selecting your process type, please complete your message to us. You can also attach scanned copies of forms you've completed by hand by clicking 'add attachment'.

Message received

Once we have replied to your message, you will receive an email informing you that you have received a new Secure Message with instructions to log in to the Your Future SIPP Portal at portal.curtisbanks.co.uk to view your message. This email will be sent to the email address you used to complete the Your Future SIPP Portal registration. You will receive a reply from either your Curtis Banks key account manager or the Curtis Banks operational team acting upon your Secure Message.

Replying to a Secure Message

Once you have logged in to view your new message you will have the option to reply and continue the message exchange by clicking the 'Reply' button.

MESSAGE FROM: NEW BUSINESS

CLOSE

Subject: Ms A Client

Plan No: 790717

Process: Submit new business forms

To: F Adviser Esq

Conversation No: SC0000001872

Customer Name: Ms A Client

Dear Mr Adviser
Before we can action your request we require the attached form to be completed and returned to us via Secure Message
Kind regards,
Administrator

- REPLY

CLOSE

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

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F 0370 414 8000
curtisbanks.co.uk

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

If you're contacting us by email, please remember not to send any personal, financial or banking information because email is not a secure method of communication.

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