

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

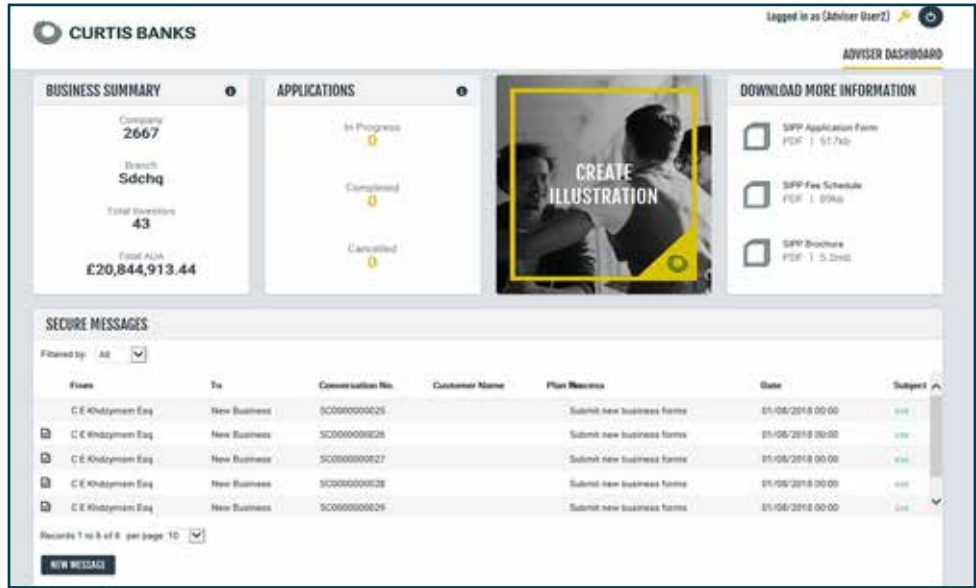
Adviser dashboard

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

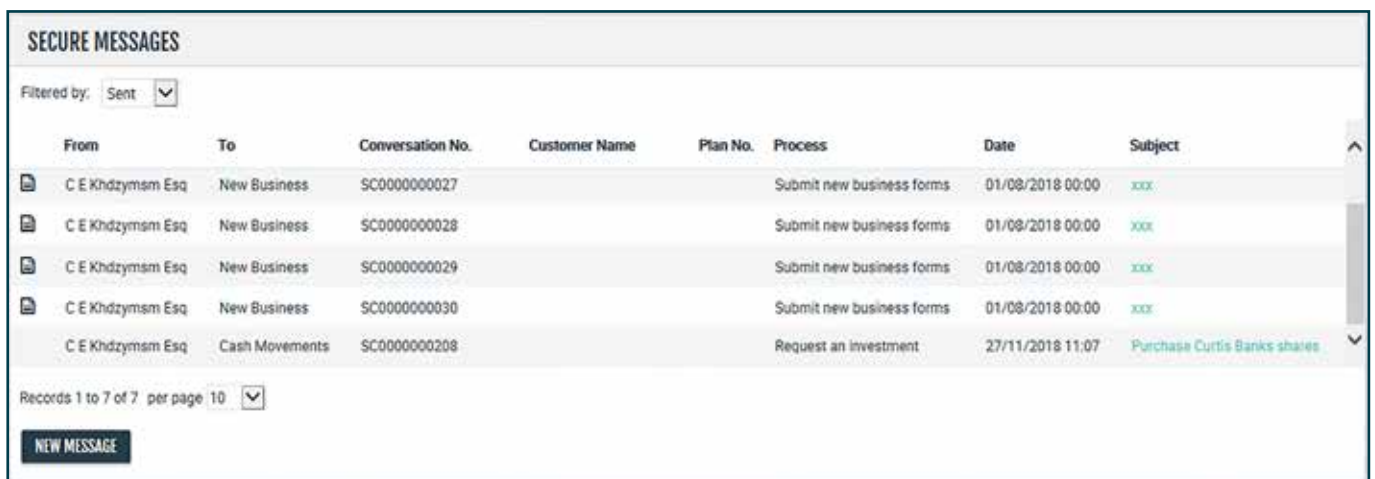
When accessing your Secure Messages you will be presented with the default view of all your Unread messages. You can view your inbox, sent items, or all messages by changing the display option in the 'filtered by' drop down list.

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



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.



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**

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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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