

# YOUR FUTURE SIPP

How to  
use Secure  
Messaging on  
the portal

How to guide

Your future, our focus.

[curtisbanks.co.uk](https://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.

The screenshot shows the Curtis Banks Adviser Dashboard. The top navigation bar includes the Curtis Banks logo, a user profile icon, and the text 'logged in as (Adviser User2)'. The main dashboard area is divided into several sections: 'BUSINESS SUMMARY' with metrics like Company 2667, Branch Sdchq, Total Investors 43, and Total AUM £20,844,913.44; 'APPLICATIONS' with status counts for In Progress, Completed, and Cancelled; a 'CREATE ILLUSTRATION' button; and a 'DOWNLOAD MORE INFORMATION' section with links to SPP Application Form, SPP Fee Schedule, and SPP Brochure. The 'SECURE MESSAGES' section is highlighted, showing a table of messages filtered by 'All'. The table has columns for From, To, Conversation No., Customer Name, Plan Name, Date, and Subject. A 'NEW MESSAGE' button is located at the bottom left of the messages section.

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

## 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.

The screenshot shows the 'SECURE MESSAGES' section of the portal. It features a 'Filtered by:' dropdown menu set to 'Sent'. Below the filter is a table with columns: From, To, Conversation No., Customer Name, Plan No., Process, Date, and Subject. The table lists five messages, all from 'C E Khodzysm Esq' to 'New Business' or 'Cash Movements'. The last message is dated 27/11/2018 11:07 and has the subject 'Purchase Curtis Banks shares'. A 'NEW MESSAGE' button is located at the bottom left of the section.

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

## 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 0370 414 7000 or email [sippsupportteam@suffolklife.co.uk](mailto: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](http://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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**Call charges will vary. We may record and monitor calls.**

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SL139.202505  
May 2025

