

How to register and log in to the online Customer Centre

User Guide

You can view your Quilter accounts using our online Customer Centre.

This guide explains how to register and log in.



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The online Customer Centre is our online service that helps you stay closer to your investments, enabling you to access valuations and correspondence online whenever you need to. It's quick and easy to register and login.

New to Quilter?

We do all we can to ensure everything runs smoothly when setting up your new account. This process can take up to 24 hours. Therefore when, as a new customer, you receive an email from us inviting you to register for the online Customer Centre (oCC), please leave it until the day after you receive that email to register for the oCC. This helps make sure your registration is set up correctly.

Want to register as a non-private customer?

if yes you will need to contact us so we can match up the registration to the correct account. We classify a non-private customer as anyone other than a private individual owning their own account. For example, this could be a corporate, trustee, power of attorney, or interested party. If that is the case please call us on 0808 171 2626 or email ask@quilter.com

Registration: our website

Registering for the online Customer Centre is the easiest way to stay up to date with your investments, enabling you to access valuations and correspondence online whenever you need to. The following steps outline how quick and easy it is to register and login.

*1. Go to platform.quilter.com/customer and click on **Register**.*

Alternatively search for 'Quilter'. Click on the main 'Quilter' link. Make sure you are on the 'Customer' tab at the top of the page. Then in the top right hand corner of the page click on the 'Activate online account' link.

Quilter Need help? [Contact us](#)

Welcome to your Customer Centre

Username [I've forgotten](#)

[NEXT](#)

Register

You need to be registered to use the Customer Centre.

You will need identification to register - this can be a driving licence, passport or electricity bill.

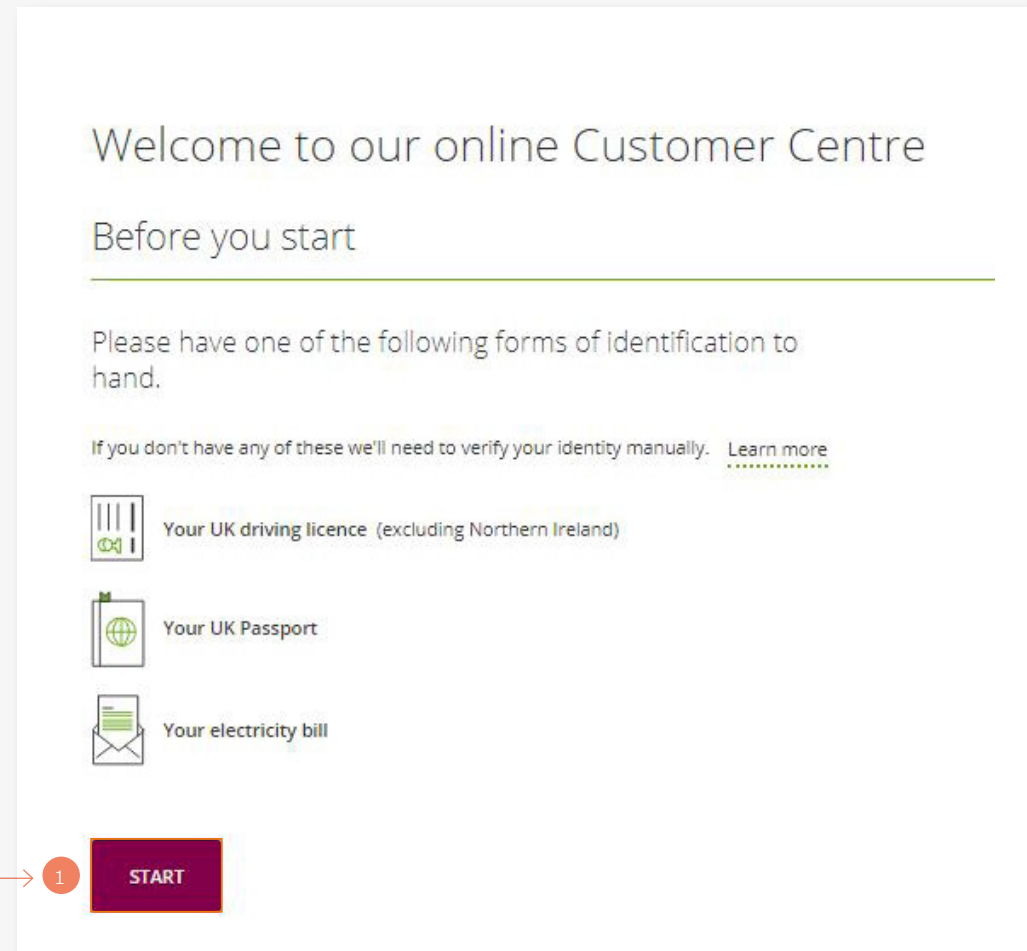
[REGISTER](#)

1

[Terms of use](#) | [Privacy and cookie policy](#) | [Legal and regulatory](#) | [Accessibility](#) | [Terms & conditions](#) | [Contact us](#)

Registration: starting the registration process

1. Select the **'Start'** button.
You just need one of the following forms of identification to hand, your driving license, passport or electricity bill.






Welcome to our online Customer Centre

Before you start

Please have one of the following forms of identification to hand.

If you don't have any of these we'll need to verify your identity manually. [Learn more](#)

-  Your UK driving licence (excluding Northern Ireland)
-  Your UK Passport
-  Your electricity bill

1 [START](#)

Account registration: your details

1. Enter your name and date of birth.

2. Enter your postcode and select 'Find address', or enter your address manually.

3. Enter your phone contact details.

4. Enter your email address.

Top Tip:

Use exactly the same name format and spelling you have used on your investments.

5. Select 'Next'.

The screenshot shows the 'Account registration' form, Step 1 of 3: Personal details. The form is divided into several sections: Personal details, Address details, Phone number, and Email address. A 'Progress' sidebar on the right shows 'Personal details' as the current step, with other steps like 'Verification of identity', 'Username & password', 'Extra security', and 'Activate your account' listed below. A 'Need help?' section with a 'Contact us' link is also present. Red callouts with numbers 1 through 5 point to the following fields: 1. First name input field. 2. Address details input field with a 'Start typing address or postcode...' placeholder and a '+ Or manually enter address' button. 3. Mobile phone number input field with a dropdown for 'UK (+44)' and a 'Send my code to this phone' radio button. 4. Home phone number input field with a dropdown for 'UK (+44)' and a 'Send my code to this phone' radio button. 5. Email address input field. A 'Confirm email address' input field is also visible below the email address field. A 'NEXT' button is located at the bottom right of the form.

Registration: verify your identity

To keep your financial information secure, we need to verify your identity by asking for details from a document you may have.

1. Select the type of document you are using.

2. If you do not have any of these forms of identification, tick here. You can contact us at the end of the process and we will help you to complete your registration.

3. Enter the required details from the document, such as your passport number.

4. Select 'Next'.

Verification of identity

In order to comply with regulations and to protect your data, we will check your identity through a third party service. [Learn more](#)

Please select which document you would like to use to verify your identity.

I don't have any of the forms of identification. I understand that I'll need to contact Old Mutual Wealth in order to verify my identity at the end of this registration process.

Driving licence Passport Electric bill

UK Passport

Passport number

Next

Progress

- Personal details
- Verification of Identity
- Username & password
- Extra security
- Activate your account

Need help?
[Contact us](#)

Registration: username and password

1. Create your username which must contain at least six characters.

2. Create your password which must contain at least one lowercase letter, one uppercase letter, one number and be at least 8 characters long.

3. Select **Next**.

The screenshot displays the 'Account registration' process, specifically 'Step 3 of 5 — Username & password'. The interface includes a 'Cancel' button (top left), a 'Previous' button (middle left), and a 'NEXT' button (bottom right). The 'Create your username' section has a requirement of 'at least six characters' and a text input field containing 'Pebbles2'. The 'Create your password' section lists requirements: 'at least one lowercase letter', 'at least one uppercase letter', 'at least one number', and 'at least 8 characters'. It features two password input fields: 'New password' and 'Confirm new password'. A 'Progress' sidebar on the right indicates the current step is 'Username & password', with other steps like 'Personal details', 'Verification of identity', 'Extra security', and 'Activate your account' shown as completed or pending. A 'Need help?' section with a 'Contact us' link is also present.

Registration: memorable picture and phrase

1. As an extra security measure to help keep you safe each time you log in, we'll show you a memorable picture and phrase to prove you are on our online service before you access your account. You can use the picture and phrase we've provided or pick your own.

2. Select **Next**.

The screenshot shows the 'Account registration' page, Step 4 of 5: Extra security. The page is titled 'Account registration' and has a 'Cancel' button in the top left. Below the title, it says 'Step 4 of 5 — Extra security'. The main content area has a 'Previous' button on the left. The text reads: 'Your security is really important to us. As an extra security measure to help keep you safe each time you log in, we'll show you a memorable picture and phrase to prove you're on our platform before you enter your password. You can use the picture and phrase we've provided or pick your own. [Learn more](#)'.

There are two main sections: 'Memorable picture' and 'Memorable phrase'. The 'Memorable picture' section shows a picture of colorful LEGO bricks and a 'Pick my own' button. A red circle with the number '1' and an arrow points to the 'Pick my own' button. The 'Memorable phrase' section shows a green box with the text 'Consequence alot list' and a 'Pick my own' button.

On the right side, there is a 'Progress' section with a list of steps: 'Personal details', 'Verification of identity', 'Username & password', 'Extra security' (highlighted in green), and 'Activate your account'. At the bottom right, there is a 'Need help?' section with a 'Contact us' link.

A red circle with the number '2' and an arrow points to a purple 'NEXT' button at the bottom center of the page.

Registration: activation email

1. We will send an activation email to the email address you provided when you registered with us.

2. At the same time we will send a registration code to the phone number you have registered with us. Please enter this code on our website.

3. Please click on the link in the email to activate your account. A registration page displaying the memorable picture and phrase you have chosen will open.

Thank you for your information

1



We've sent an activation email to 1@1.com. Please click the link in this email to activate your account.

Need help?

Contact us

2

When you click the link, a registration page displaying your memorable picture and phrase will open. At the same time, we'll send a registration code to your phone *****456. You'll need to enter this code and then you should be all set. If we need to check anything else with you then we'll let you know.

BACK TO OUR WEBSITE



3

Registration: verification code

1. Your memorable picture and phrase will be displayed so you know that it is us. Enter the verification code we have sent to your phone and click **'Confirm'**.

2. If you did not get a code you can click here to request a new one. It may take up to 30 seconds for the code to come through.

3. Once you click confirm you have completed the registration process. If in the unlikely event you have any problems and you cannot complete the registration process please call us on **0808 171 2626**.

Quilter

Need help? 0808 171 2626
Other contacts

Account registration

Your memorable picture and phrase

I'm on strike!

Your email has been verified. We have just sent you an authorisation code via SMS to ****199

Please enter the code below and click 'Next'.

1

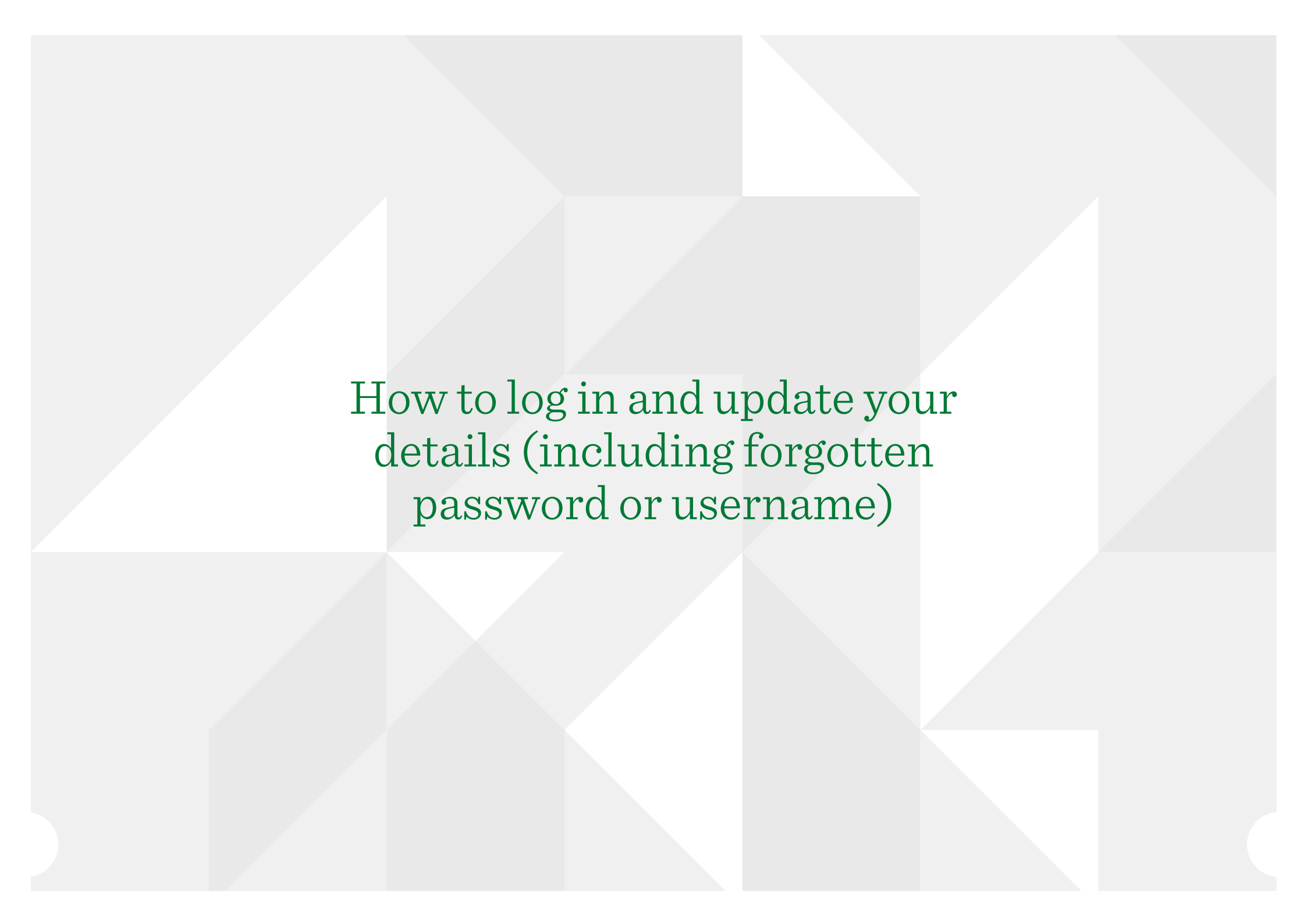
2 Didn't get a code?

3 CONFIRM

Progress

- Personal details
- Verification of identity
- Username & password
- Extra security
- Activate your account

Need help?
Contact us



How to log in and update your
details (including forgotten
password or username)

My accounts page: log in

1. Once you have completed the registration process, to log in to your online account, go to our website, platform.quilter.com/customer and enter your username.

2. The memorable picture and phrase you registered will be displayed. Enter your password and click '**login**' to log in. You may be asked to accept our updated Terms and Conditions before continuing to the online Customer Centre.

The image displays two sequential screenshots of a web login interface. The first screenshot, on the left, shows the 'Login' page with a 'Username' field containing 'Pebbles3' and a 'NEXT' button. A red callout '1' points to the username field. The second screenshot, on the right, shows the same page after clicking 'NEXT'. It displays 'Your memorable picture and phrase' with a photo of colorful mugs and the text 'I'm no mug.', a 'CHANGE' button, and a 'Password' field. A red callout '2' points to the memorable picture and phrase section, and a red callout '3' points to the password field.

I have forgotten my username

1. If you have forgotten your username when logging in, then click the **'I've forgotten'** link on the Customer Centre logon page

Quilter Need help? [Contact us](#)

Welcome to your Customer Centre

Username [I've forgotten](#)

1

Register

You need to be registered to use the Customer Centre.

You will need identification to register - this can be a driving licence, passport or electricity bill.

2. When the forgotten username screen comes up, enter your registered email address in the box then press **'continue'**.

Quilter Need help? [Contact us](#)

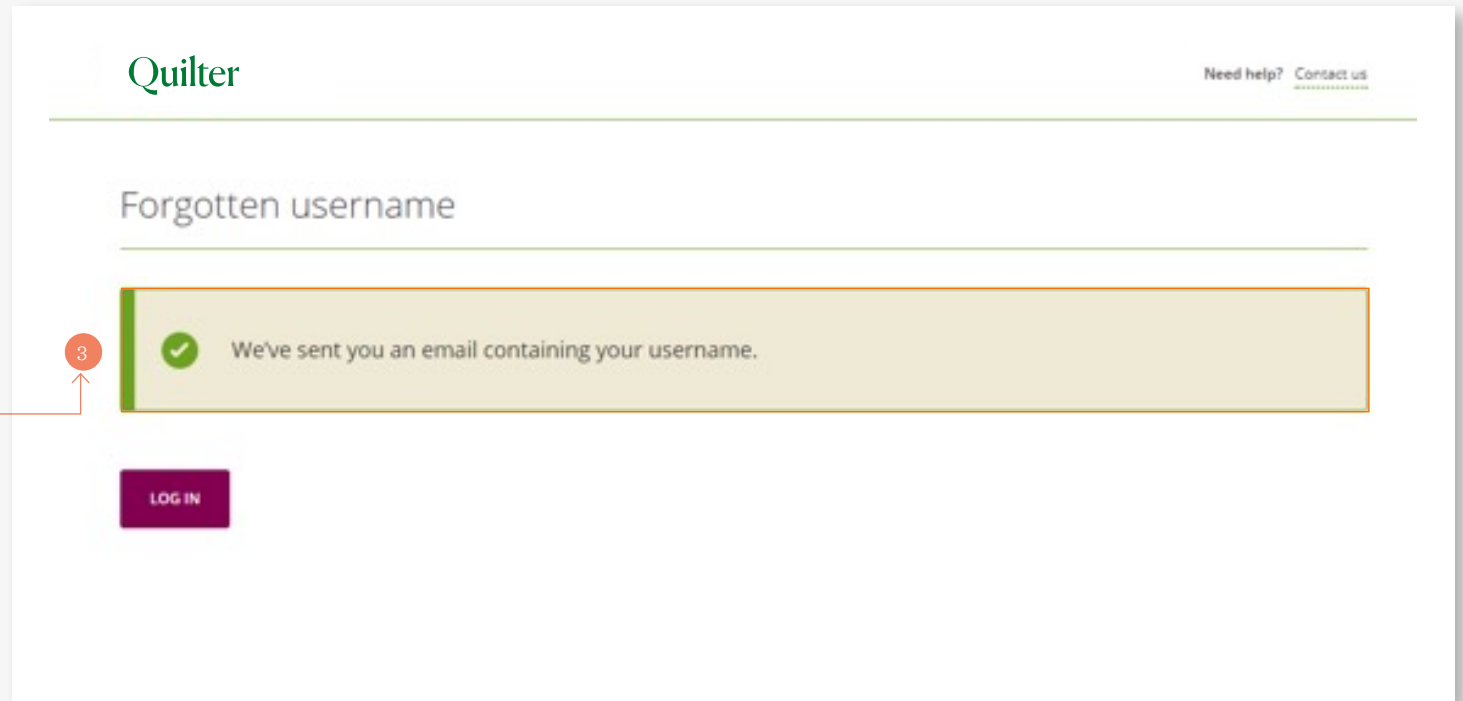
Forgotten username

Please enter your email address

2

I have forgotten my username

3. We will email you your username and you will see the confirmation message. Once you have the email with your username, log in by clicking the **'log in'** button.



I have forgotten my password

1. Enter your username in the **'Username'** field, then select **'Next'**

Quilter Need help? [Contact us](#)

Welcome to your Customer Centre

Username [I've forgotten](#)

[NEXT](#)

Register

You need to be registered to use the Customer Centre. You will need identification to register - this can be a driving licence, passport or electricity bill.


[REGISTER](#)

2. On the enter password screen select the **'I've forgotten'** link.

Quilter Need help? [Contact us](#)

Enter password

Your memorable picture and phrase



[Dated consider](#)

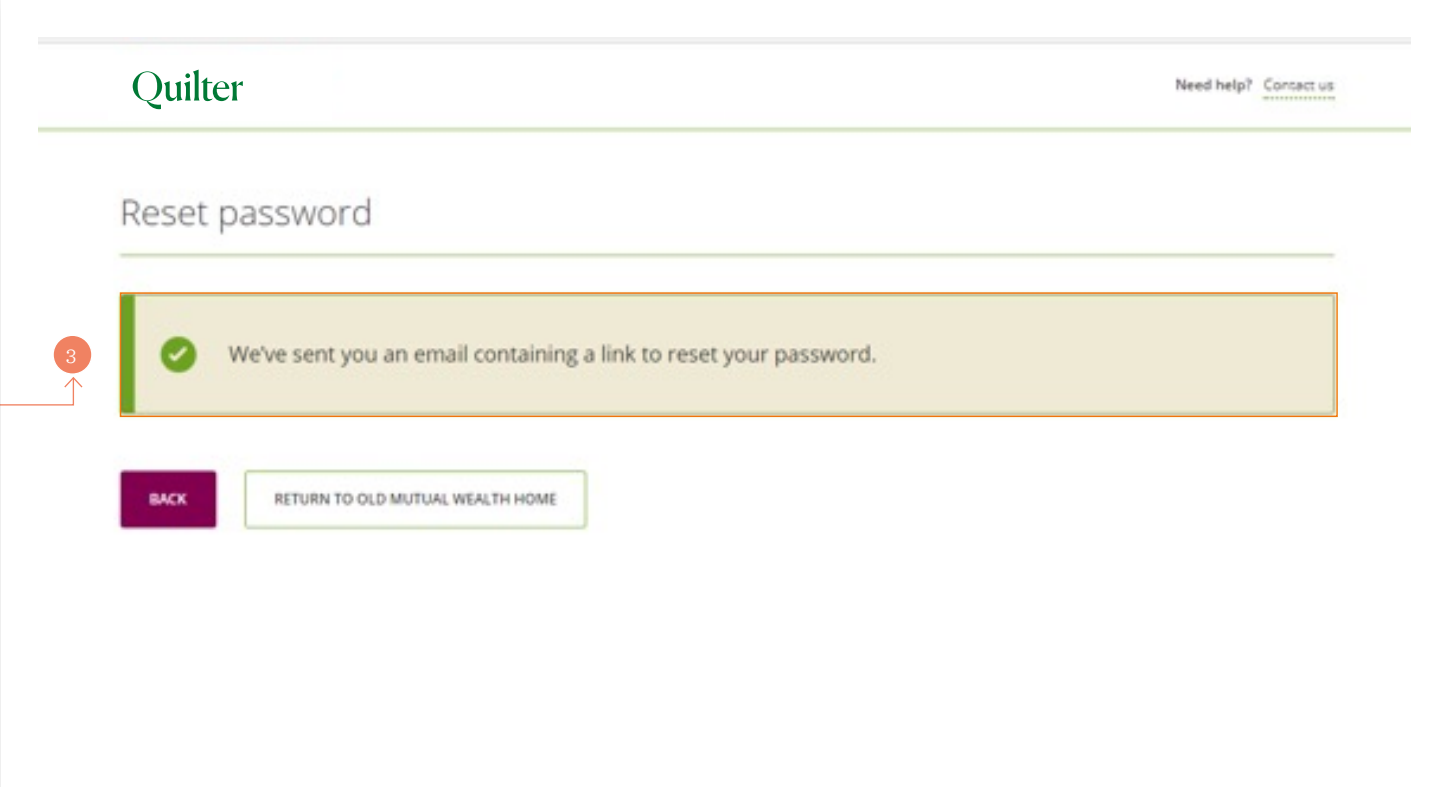
You're logging in as [CHANGE](#)

Password [I've forgotten](#)

[LOGIN](#)

I have forgotten my password

3. You will receive a message to confirm that an email has been sent to your registered email address. You will need to click on the link in the email once you've received it and then reset your password.



The screenshot shows the Quilter website's password reset confirmation page. At the top left is the Quilter logo, and at the top right is a link for 'Need help? Contact us'. The main heading is 'Reset password'. A central message box with a green checkmark icon states: 'We've sent you an email containing a link to reset your password.' Below this message are two buttons: a purple 'BACK' button and a white 'RETURN TO OLD MUTUAL WEALTH HOME' button. A red circle with the number '3' and an arrow points to the message box, corresponding to the third step in the text on the left.

Updating security, personal details and correspondence preferences

You can update your security and address details as well as your correspondence preference details using the 'My details' ⁽¹⁾ option at the top of the account overview page.

- **Security details** ⁽²⁾ – this allows you to update your email address as well as your password and security details.
- **Residential address** ⁽³⁾ – this shows your current residential address and can be amended using the update button on the right.
- **Correspondence address** ⁽⁴⁾ – this shows the address we use for correspondence and can be updated like your residential address using the update button. This shows whether it is the same as your residential address.
- **Correspondence preference** ⁽⁵⁾ – you can choose to receive correspondence online only, or online and by post. Certain regulatory documents will always be sent by post. Your current preference is displayed on the screen and can be changed using the 'Update correspondence preference' button on the right.

Account	Account number	Value	£ +/-	% +/-
ISA	AC	£17,689.57	£2,689.57 ↑	18.10% ↑
Collective Investment Account	AC	£59,584.98	£415.02 ↓	-0.70% ↓
Collective Investment Bond	AC	£15,306.16	£15,306.16 ↑	0.00% -

Residential address

Po Box 37, Southampton, Hampshire, UK, SO14 7AY

Update residential address

Correspondence address

Correspondence address is the same as residential address

Update correspondence address

Correspondence online and by post

You have chosen to receive correspondence online and by post. Online correspondence is available in "My documents".

Update correspondence preference

platform.quilter.com

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

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