




Discuss going online  
with your adviser



Wait for your letter and then  
activate your online account



Enjoy the benefits  
of going online

Dear Anon

## Get online with Quilter

Your adviser [redacted] has let us know that you would benefit from being given access to your Quilter account and documents online.

Great news, we've got your online account all set up and ready for you. To help you activate it, we have sent you a letter with some simple steps to follow, including the unique codes you'll need to unlock your online access.

Activating your account couldn't be easier, and you'll only be able to access your account and documents online once you've done so.

### What are the benefits of going online?

More and more of our customers are already accessing their Quilter investments online, in the same way they do for online banking. Like them, you will:



**Never lose an important letter**  
– all your documents are waiting for  
you in your personal document  
library.



**Get easy and instant access**  
– all your Quilter investments  
are available at your  
fingertips.



**Have more secure information**  
– help us combat fraud by not  
having to send your personal data  
in the post.

### What do I need to do?

Just sit back and wait for your letter containing your Unlock Codes and further guidance on getting online.

If you have any questions about this email speak to your financial adviser. Alternatively, you can contact us on freephone **0808 171 2626** or email us at [ask@quilter.com](mailto:ask@quilter.com).

Thank you for being a Quilter customer, we value your investment with us.

Kind regards

### Callum Earl

Head of Client Services



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The VAT number for Quilter Investment Platform, Quilter Life & Pensions Limited is 386 1301 59.



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### Download the Quilter app and activate your online account today

A few weeks ago we sent you an email as your adviser, \_\_\_\_\_, submitted an application which included giving you access to your account and documents online. We also sent you a letter in the post with your unique codes to unlock your online access and activate your account using our app.

We've noticed you haven't activated your online account yet. Until you do, you won't be able to access your account and documents, and you may be missing out on important information on your investments.

Your account is ready and waiting for you. By activating your account now, you can ensure that you don't miss out on the additional benefits that going online provides customers like you, including:



**Never lose an important letter**  
– all your documents are waiting for  
you in your personal document  
library.



**Get easy and instant access**  
– all your Quilter investments  
are available at your  
fingertips.



**Have more secure information**  
– help us combat fraud by not  
having to send your personal data  
in the post.

#### What do I need to do?

It's important that you activate your account as soon as possible so that you can view your account and important documents.



If you no longer have the Unlock Codes we sent you, don't worry, you can still activate your account using the app. Just **download the app** and tap the register option. When prompted, pick the option to activate without a letter with Unlock Codes and follow the on-screen instructions. You will need your driving licence or passport, and it usually takes most customers just a few minutes.

#### You can also access your account using our website



If you would prefer to access your account and documents from your desktop or web browser, you can do this by **visiting our online Customer Centre** and following the on-screen instructions. Activating your account is easy, all you need is your driving licence number, passport number or utility bill, and it usually takes most customers just a few minutes.

#### My next steps

Please activate your account following the steps above to make sure you don't miss out on important information about your investments.

If you don't activate your online account, we won't be able to give you access to all your online benefits.

If you have recently activated your online account, thank you and there's nothing else you need to do.

**Thank you for being a Quilter customer, we value your investment with us.**

Kind regards

#### Callum Earl

Head of Client Services



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### Activate your online account today

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As we're sure you know, this was because your adviser, \_\_\_\_\_ submitted an application which gave you access to your account and documents online.

Your account is ready and waiting for you. By activating your account now, you can ensure that you don't miss out on the additional benefits that going online provides customers like you, including:



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**Get easy and instant access**  
– all your Quilter investments are available at your fingertips.



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