



JAMES HAY ONLINE

James Hay Online offers a range of functional and highly intuitive tools, as well as a wealth of information to enable you to manage and monitor your investments online.

How do I...

Q Log on?

A If you have already registered for James Hay Online, go to www.jameshay.co.uk/portal/login.aspx and enter your username, password and passcode.

If you do not already have a James Hay Online account, you can register on the same page and set up your desired username, password and passcode in three easy steps. For security purposes, we will then send an activation code to you in the post, which will allow you to complete the registration process.

Q Amend personal details - address/ marital status/name?

A Once you have logged into James Hay Online, go to any tab and your name will appear at the top of the page as a blue link. Click your name and a pop up window will appear displaying your details. At the bottom there will be an **Amend Plan details** button.

Click the button and you will be able to edit and submit any changes to your details.

Q See instant valuations?

A Go to the **Portfolio** tab and you can access successive layers of detail concerning your plan, across all different types of investments.

Q Check transaction summary?

A Go to the **Portfolio** tab and click into **Collectives** or **Other Investments**. Your investments will be listed in rows and in the end column; the first icon will be a button to view transactions on each holding.

Q Transfer money to and from Investment Managers?

A Go to the **Portfolio** tab and on the left hand side is a list of pages. Under the **Investment Manager** heading is a **Cash Transfer** link in grey.

Enter the amount and the direction of the transfer and click submit.

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Download your forms at jameshay.co.uk

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Q Check transfers, contributions and income information?**A** Go to the **Portfolio** tab and click on:

- **Transfers In**
- **Contributions**
- **Income Summary and Income History**

Q How do I place an Investment Centre trade online?**A** Go to the **Trade** tab in **James Hay Online** and you will see **Buy, Sell** and **Switch** links in a table at the top of the page in the **Investment Centre** section. Click the relevant link and you will then be able to place your desired trade.**Q** Retrieve documents?**A** Related to your application...Go to **Tools > Online Documents****Q** Find literature items?**A** Visit www.jameshay.co.uk and click the literature button in the main navigation bar at the top of the page. This will drop down a list of products. Select your product and you will be presented with the suite of literature that supports your product.**Q** Contact James Hay Partnership by secure message?**A** We take information security very seriously, which is why we would encourage you to use our secure messaging facility. This free service is more secure than email and enables us to complete your instructions faster.To send a secure message, go to **Messages** and click **Compose message**. A pop up will appear; complete all the relevant fields and details and click submit.

Contact us on:

**0845 850 4455****www.jameshay.co.uk**

James Hay Partnership is not authorised to give financial advice. If you need financial advice, please speak to your Financial Adviser. If you would like to speak to a Financial Adviser but do not have one, please visit www.unbiased.co.uk.

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