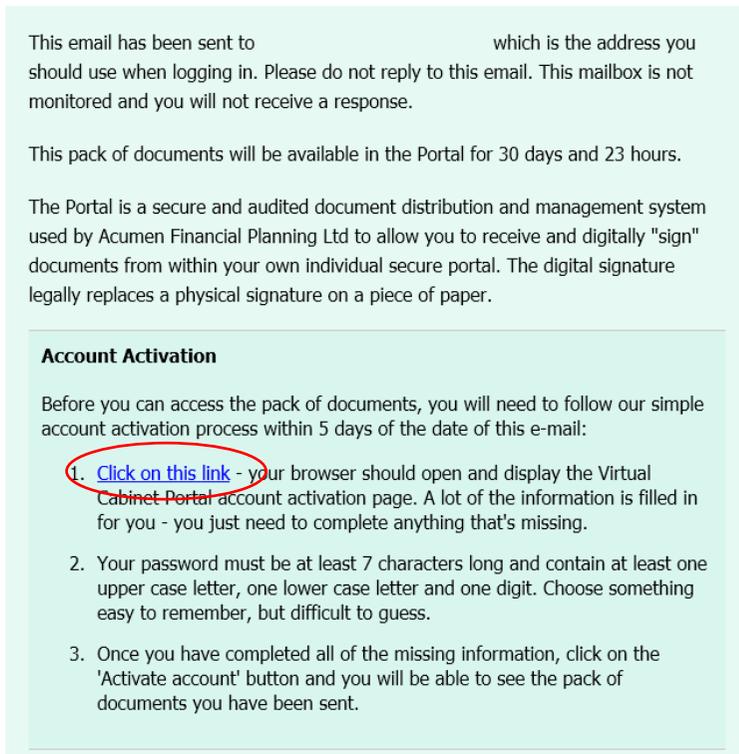


How to Download and Return documents through the Client Portal using a laptop or desktop

- 1) When sent documents through the client portal you will receive an email. If this is your first time using the portal it will look like this:



Click on the link and it will take you to the Account Activation page

Simply enter your email address and create a password and hit 'Next'

Acumen Financial Planning architects of financial promise

Activate your account: Step 1 of 2

LOGIN DETAILS | PERSONAL DETAILS

Welcome to our secure portal

Our portal allows us to communicate with you efficiently and securely. You need to create your own password and activate your account before you can access the information we have sent you.

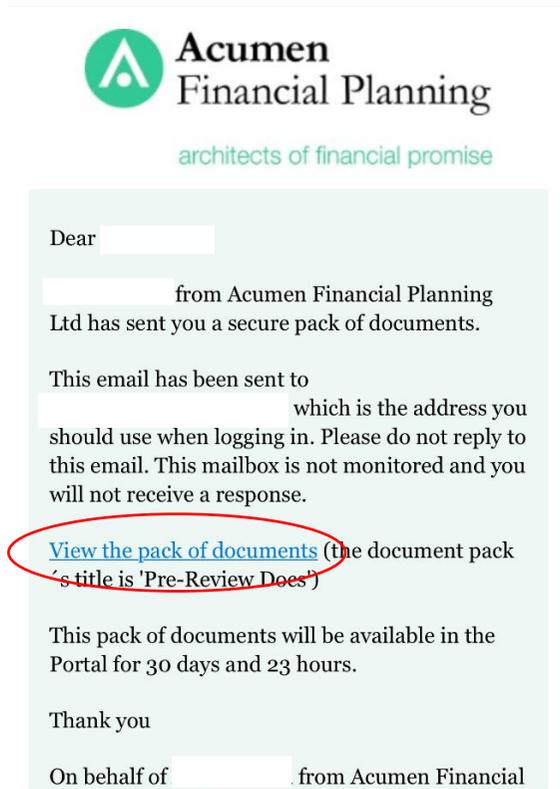
Email address
info@acumenfp.com ✓

Password
Your new password

Confirm your new password

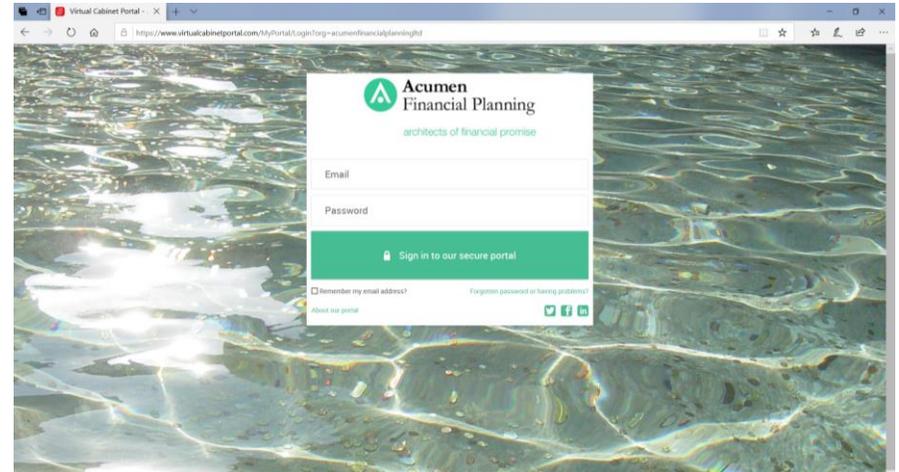
[Next](#) [About our portal](#)

If you have used the portal before, your email will look like this:

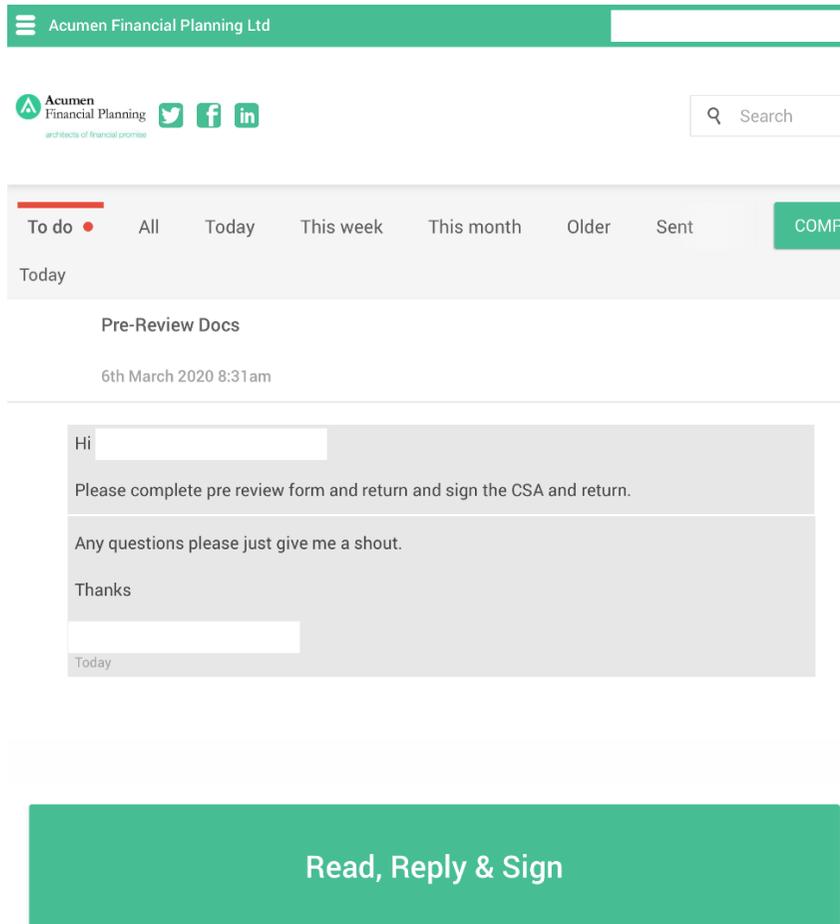


Click on 'View the pack of documents'

2) This will then take you to the log in page. Enter your email address and Password and click on the Sign in button

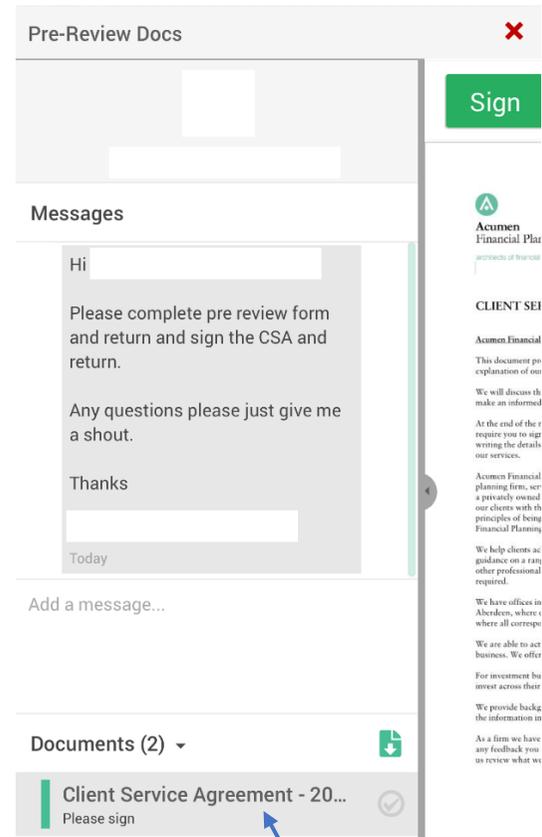


3) You will then see this page:



Click on Read, Reply & Sign

4) You will then see this page:



Click on the document name

5) This opens the document, please read it and sign it by clicking on the 'Sign' button

✕
Pre-Review Docs
 ▶ Client Service Agreement - 2020

Sign
Decline

Contact addresses

- 4 Kingshill Park, Venture Drive, Arnhall Business Park, Westhill, AB32 6FL (Head Office)
- 8 Randolph Crescent, Edinburgh, EH3 7TH
- 26 Hay Street, Elgin, IV30 1NQ
- Acumen House, Grange Road, Peterhead, AB42 1WN
- Commercial House, 2 Rabslaw Terrace, Aberdeen, AB10 1XE (Registered Office)

Communications Consent

We provide clients with an email newsletter up to four times a year. This contains relevant information about events, changing legislation and general information about the firm. Over and above this, we may send you information via email regarding selected topics such as but not limited to Pension Legislation, Capital Gains Tax, Inheritance Planning, Investments, Events, Client Feedback Surveys etc. that may be of interest or applicable to you.

You can opt out of such emails at any time, but please be aware in that doing so will stop any future information that may be of interest being received via email. This information is in addition to any direct communication from your planner.

	Client 1	Client 2
a. If you wish to receive such information from us please select this box to opt in. (Should you prefer to receive such information by post, please select this box.)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
b. If you do not wish to receive any such information from us please select this box to opt out.	<input type="checkbox"/>	<input type="checkbox"/>

(Where you have previously indicated your communication preference you do not need to provide confirmation again, unless your preference has changed.)

Your Consent

This is our standard retail client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing below. If you do not understand any point please ask for further information or clarification.

Signed _____ Date 29 October 2019
 For and on behalf of Acumen Financial Planning Limited

I/We confirm receipt of and my/our agreement to the terms contained in this Client Agreement and further acknowledge that I/we have been given at least 24 hours in which to consider my/our acceptance.

I/We authorise the transfer of information, on a confidential basis when warranted between any necessary third parties. I/We acknowledge that this Client Agreement will come into effect from the date of issue.

Name _____ (Client 1)
(Block Capitals)

Signed _____ Date _____

Name _____ (Client 2)
(Block Capitals)

Signed _____ Date _____



6) You may be asked to do a security check. This message will appear. Click on 'OK, got it!'

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Security Check

We have emailed you...

This is the first time you have used this device or browser to sign a document.

We have sent you an email that contains an authentication link. Check your email inbox, open the email and follow the instructions.

This process is important, and helps ensure that unauthorised people cannot process your documents.

It might take a couple of minutes for the email to come through. [Having problems?](#)

Ok, got it!



7) You will now have been sent another email. Click the link

Dear [redacted]

The Portal is a secure document distribution and mana [redacted]

In order to process documents and action them (sign, reject etc.), each device and web browser you use must be authenticated.

You have been sent this e-mail because you have attempted to sign or reject a document on a new device for the first time.

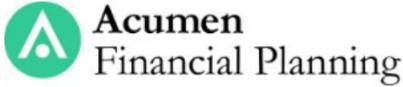
Please open this e-mail using the device on which you are using the portal and click on the following link, or alternatively, copy and paste the link into the web browser's address bar:

https://www.virtualcabinetportal.com/link/?url=%2fMyPortal%2fAuthenticate%2f6f0085c1-b257-4bf4-8cod-c65234d5761c%3forg%3dacumenfinancialplanningltd%26utm_source%3dVCP%26utm_medium%3dEmail%26utm_campaign%3dUsage%26utm_term%3dAuth

Please note that the link will be valid for the

8) This page will now appear, select which option is applicable (normally private)

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Device Privacy

This browser has been successfully authenticated, please select a privacy option.

This device is private

Authentication will remain for this browser in future

Or

This device is public

Authentication will expire when you close the browser or log out

Virtual Cabinet © Portal
© 2020 GetBusy UK Limited
Terms | Privacy | Contact Us
Read about how we use cookies

9) You will then see this page. There is no need to type a message, just click on 'Sign'

Signing Statement

By electronically signing this document, I acknowledge this is the equivalent of providing a written signature on a hardcopy document.

Message

Type an optional message that will also be added to the signed document...

500

Your Signature

Your signature will contain:

- ✓ information that identifies you
- ✓ any message you have entered above
- ✓ your current I.P. address (51.52.158.238)

Sign **Cancel**

10) This page will then appear giving you the option to download the document. We suggest you select 'Download a copy'

Thanks!

You have successfully signed the document Client Service Agreement - 2020.



We've notified Andrea

What next?

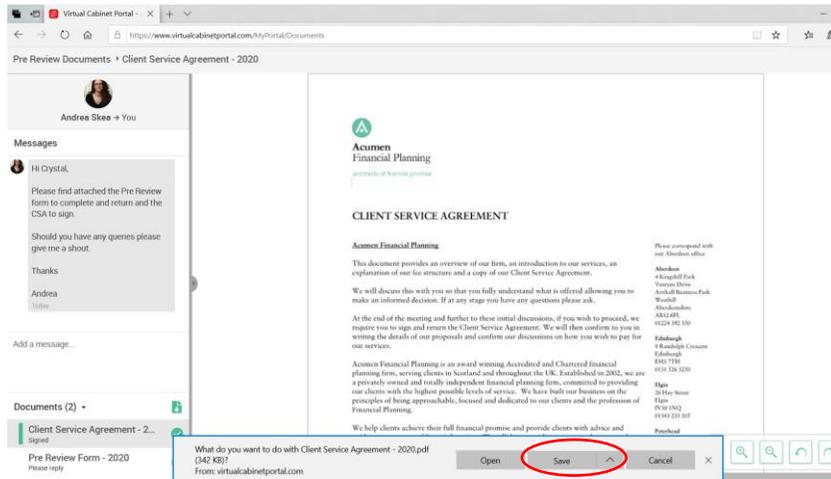
Download a copy

Read and Reply next

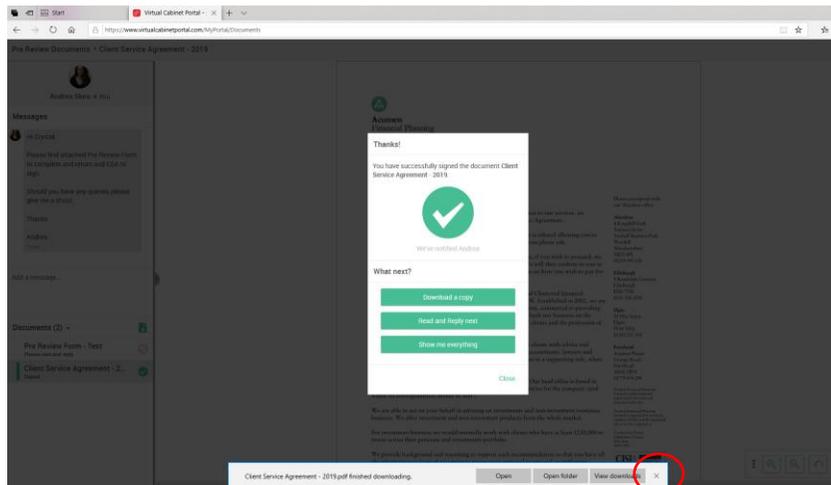
Show me everything

Close

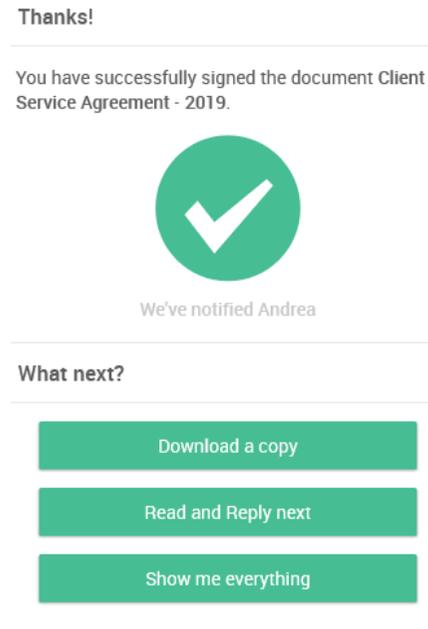
11) This message then appears, select Save then Save as. Save the document to wherever you wish on your computer, desktop etc



Then close by selecting the 'x'



Select 'Close'



Close

12) Click on Pre Review Form. Select 'Click here'

Pre Review Documents ✕

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CLIENT SERVICE AGREEMENT

Acumen Financial
This document provides an explanation of our services and the fees we will charge. We will discuss this document with you and make an informed decision on whether to engage our services. At the end of the meeting, we require you to sign and return this document to us. We help clients achieve their financial goals through a range of other professional services. We have offices in Aberdeen, where all correspondence is handled. We are able to act as a fiduciary. We offer investment management services. We provide background information on the companies we invest in. As a firm, we have a strong track record and you can review what we have achieved for our clients.

Messages find attached the Pre Review Form to complete and return and the CSA to sign.

Should you have any queries please give me a shout.

Thanks

Today

Add a message...

Documents (2) ↓

- Client Service Agreement - 20...
Signed ✓
- Pre Review Form - 2020**
Please reply ✓

Pre Review Documents ✕

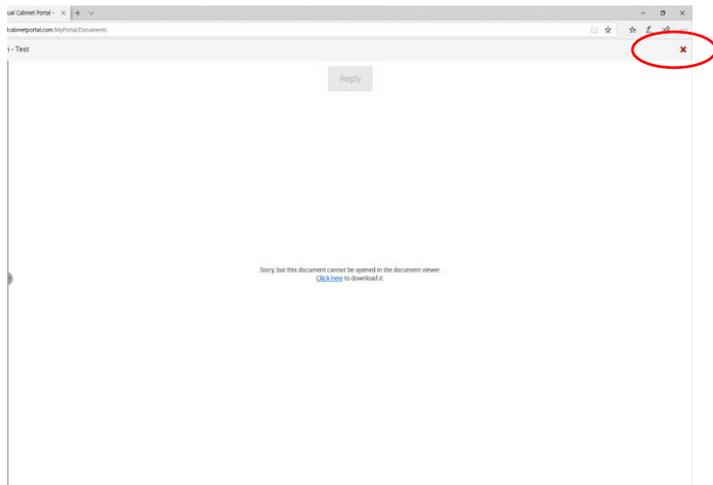
▸ Pre Review Form - 2020

Reply

Sorry, but this document cannot be opened in the document viewer.

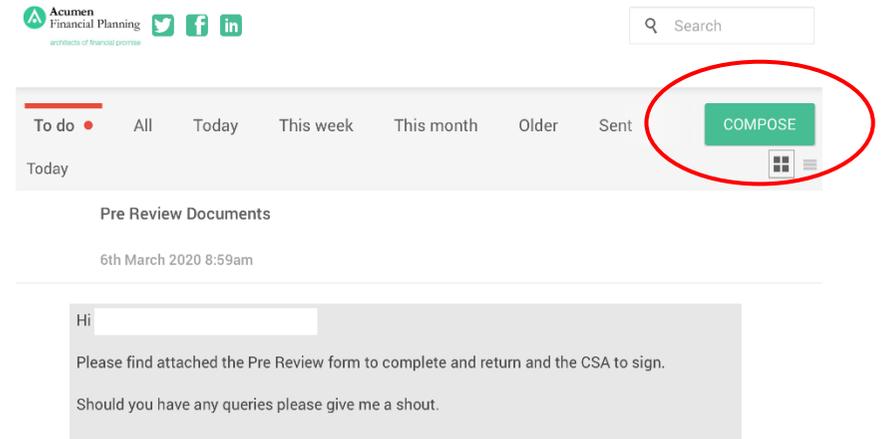
[Click here](#) to download it.

15) Click on the red 'x' to close this window

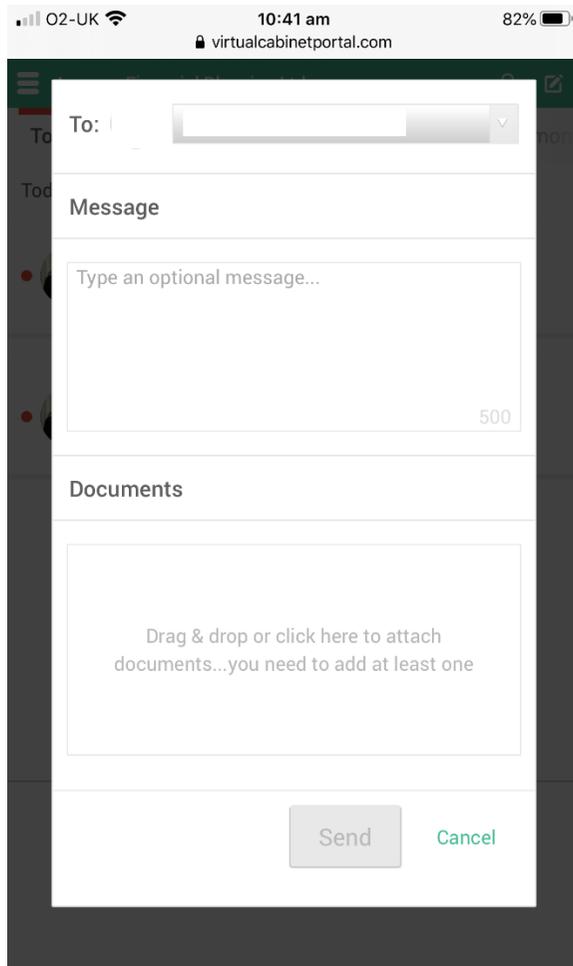


16) You may have to input your portal password again

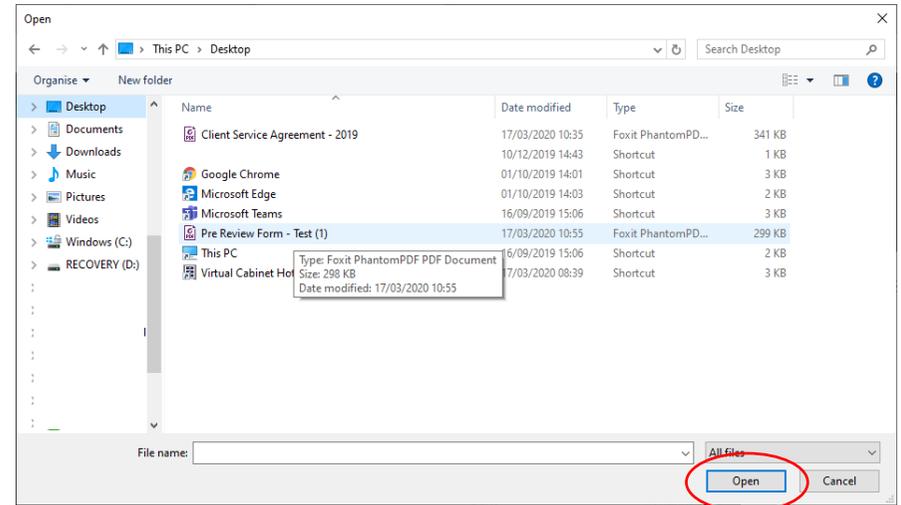
Once back in the Portal you will see a 'Compose' button



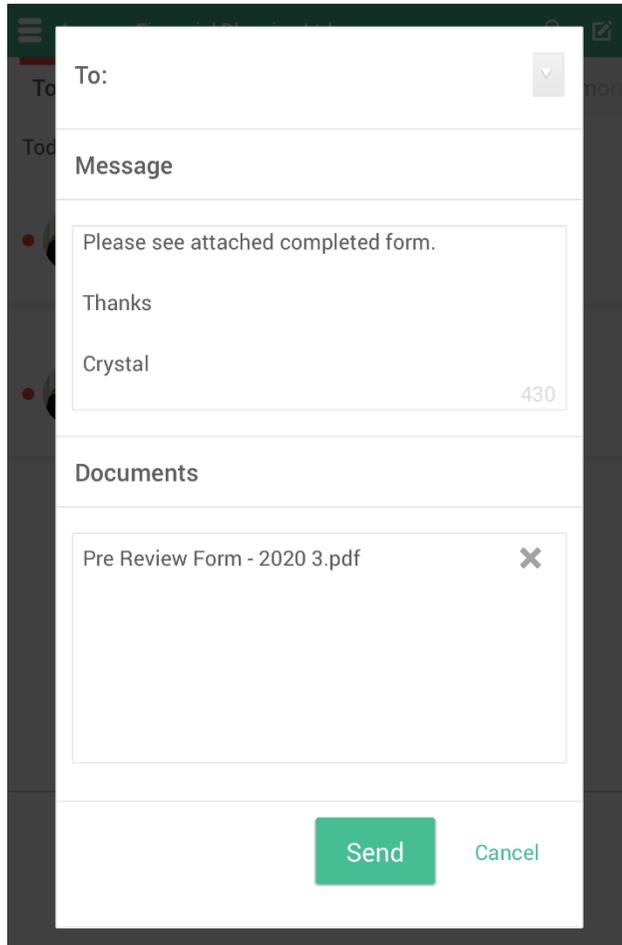
17) This window now appears. You can type a message in the message box if you wish then click on the document box



18) This will take you to where all your documents are saved and allows you to browse to find your saved completed form. Select the Pre Review Form. (You can add multiple documents, just repeat step 17)
Select Open



19) Hit 'Send'



20) A confirmation message will then appear. Select 'Close' and exit the portal.

