

UNITY PLATFORM ESSENTIALS GUIDE

Your accounts, money, documents and help

DATE

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PREPARED BY

DMA

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1 About this guide

This guide covers the parts of the Unity platform you will use most to look after your accounts: seeing your position, checking your plan, downloading documents, keeping up with news, managing your details and getting help.

Each section explains what the screen is for, what you will find on it and how to complete the most common tasks. **Section 2** is a quick reference: find the task you want to do and it tells you where to go.

Screenshots are taken from the current version of the platform. Figures, names and account numbers shown are examples.

DMA TIP

Every screen in this guide is in the menu on the left. Select a menu item to go straight to it. The page title at the top always tells you where you are.

2 Quick reference: I want to...

I want to...	Go to	Then
See how all my accounts are doing	Home	Read the total value and evolution chart
Check my account or policy	Plan	Review the policy summary and tabs
See or update my beneficiaries	Plan → Beneficiaries	Review who receives the policy benefits
Download a statement or tax certificate	Reports & statements	Pick the report, account and period, then download
Read articles, research and education	News	Browse the Library or the Education tab
Update my personal details	My profile	Select Edit on the section you want to change
Change my email, mobile or notification settings	User preferences	Select Update next to the item
Get help or raise a query	Support centre	Search the FAQs, or start a new request
Give feedback on the platform	Feedback	Write your feedback and submit

3 Home

Home is your starting point every time you log in. It brings all of your accounts together so you can see your overall position at a glance.

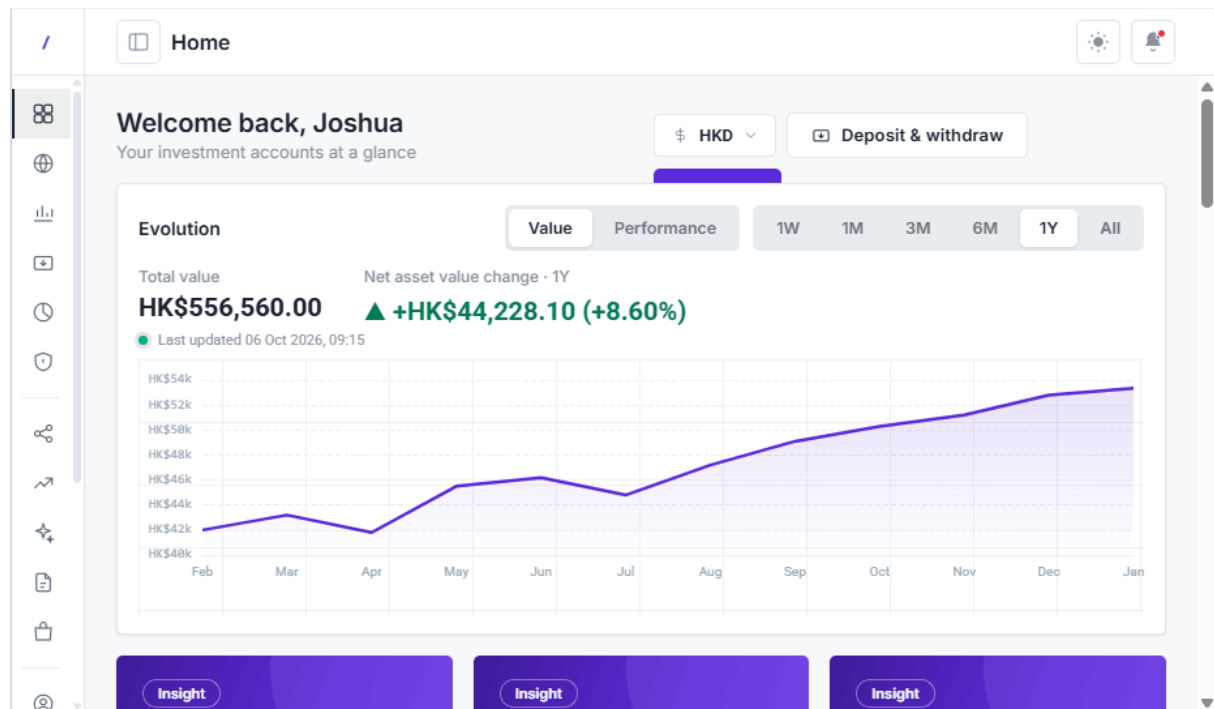


Figure 1 Home — total value, evolution chart and currency selector

What you will find

- / **Total value and net asset value change** for the selected period, with the time it was last updated.
- / **Evolution chart** view your value change over 1 month, 3M , 6M , YTD and All time
- / **Currency selector** at the top right, to show everything in your preferred reporting currency.
- / **Top performance** your top performing holdings based on percentage return
- / **Portfolio allocation** view across your account where your investment allocation lies for asset classes and across currencies
- / **Latest news** top posted articles, videos and podcasts

4 Plan

Plan shows your products, such as a SIPP or ISA

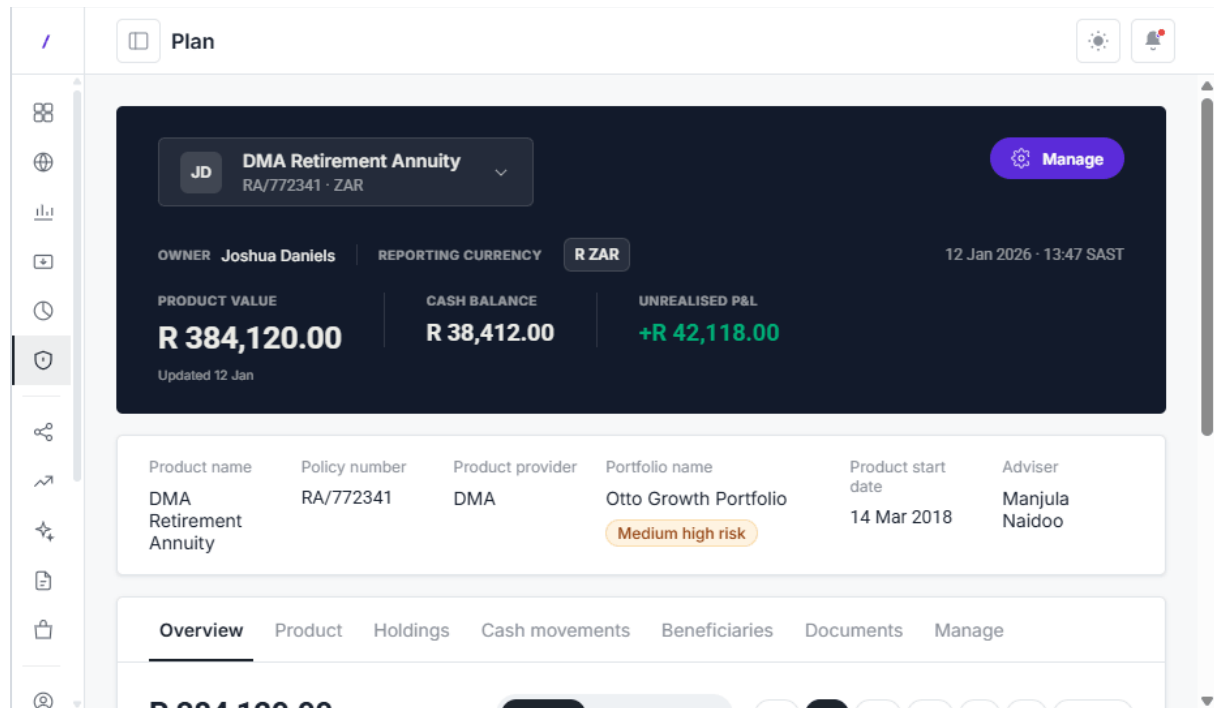


Figure 2 Plan — policy summary and tabs

What you will find

- / **Summary panel:** product value, cash balance and unrealised P&L for the selected policy, with the date it was last updated.
- / **Policy details:** product name, policy number, provider, portfolio, risk profile, start date, adviser and employer
- / Use **Manage** at the top right of the summary panel for plan actions.

Tabs

Tab	What it shows
Overview	Policy value and performance over time
Product	Details of the product such as pot splits, transactions and transfer requests
Holdings	The investments held within the policy
Cash movements	Contributions, withdrawals, fees and other cash movements
Beneficiaries	Who receives the policy benefits, and their share
Documents	Policy documents and statements
Manage	Management forms housed here

5 Reports & statements

Reports & statements is where you generate and download your account documents.

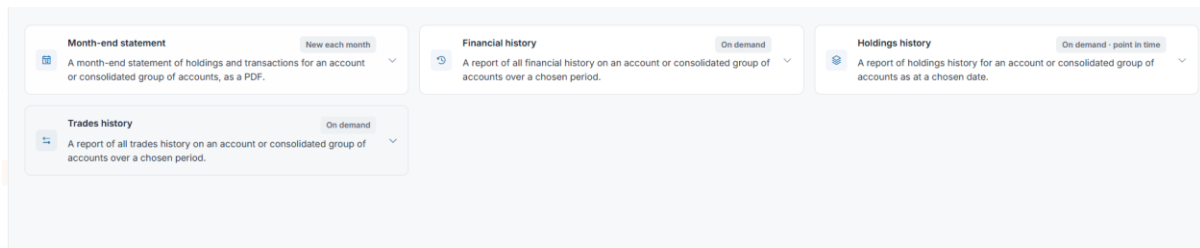


Figure 3 Reports & statements — choose a report, account and period

Available reports

Report	What it contains
Monthly statement	A summary of your account for the month: opening and closing values, holdings, cash flows, fees and transactions
Performance report	How your portfolio has performed over a period you choose, broken down by holding and asset class
Trades history	All trade activity over a selected period
Holdings history	Holdings history for a selected account or consolidated group of accounts at a chosen date
Financial history	Financial history on an account or consolidated group of accounts over a chosen period

How to download a report

- 1 Go to **Reports & Statements**.
- 2 Find the report you need and click the down arrow.
- 3 Choose complete the required fields i.e. Select account or Select a date range
- 4 Download the report.

6 News

News is the content hub for articles, videos and podcasts from the research team, plus education content to build your investing knowledge.

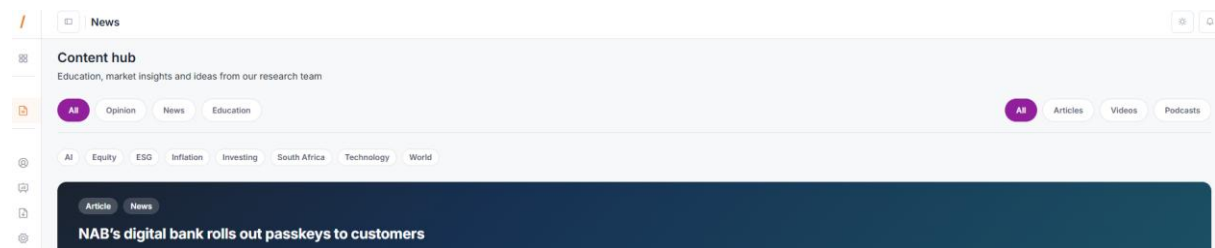


Figure 4 News — content hub library

What you will find

- / **Content hub:** the latest articles, opinion and news. Filter by format (articles, videos, podcasts) or by topic, such as technology, commodities, fixed income or emerging markets.

7 My profile

My profile holds your personal details. My profile and User preferences share one page with tabs, so you can move between them without going back to the menu.

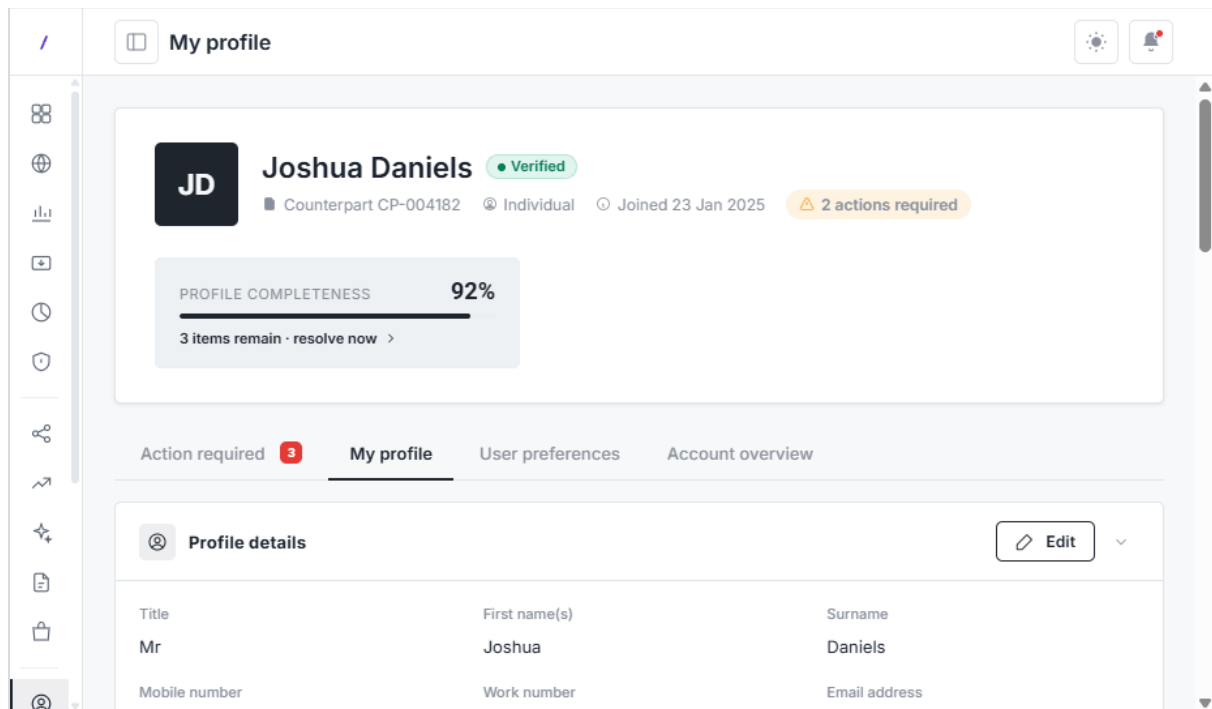


Figure 5 My profile — personal details and profile completeness

What you will find

- / **Profile header:** your name, client reference, verification status and the date you joined.
- / **Profile completeness:** how complete your profile is, and how many items remain. Select it to resolve them.
- / **Action required** tab: anything that needs your attention, such as documents to upload or details to confirm.

How to update your details

- 1 Go to **My profile**.
- 2 Find the section you want to change, such as **Profile details**, and select **Edit**.
- 3 Make your changes and save.

INSIGHT

Some changes, such as your legal name or address, may need supporting documents before they take effect. You will be told what is needed when you save.

8 User preferences

User preferences is where you manage your contact details and how you hear from us.

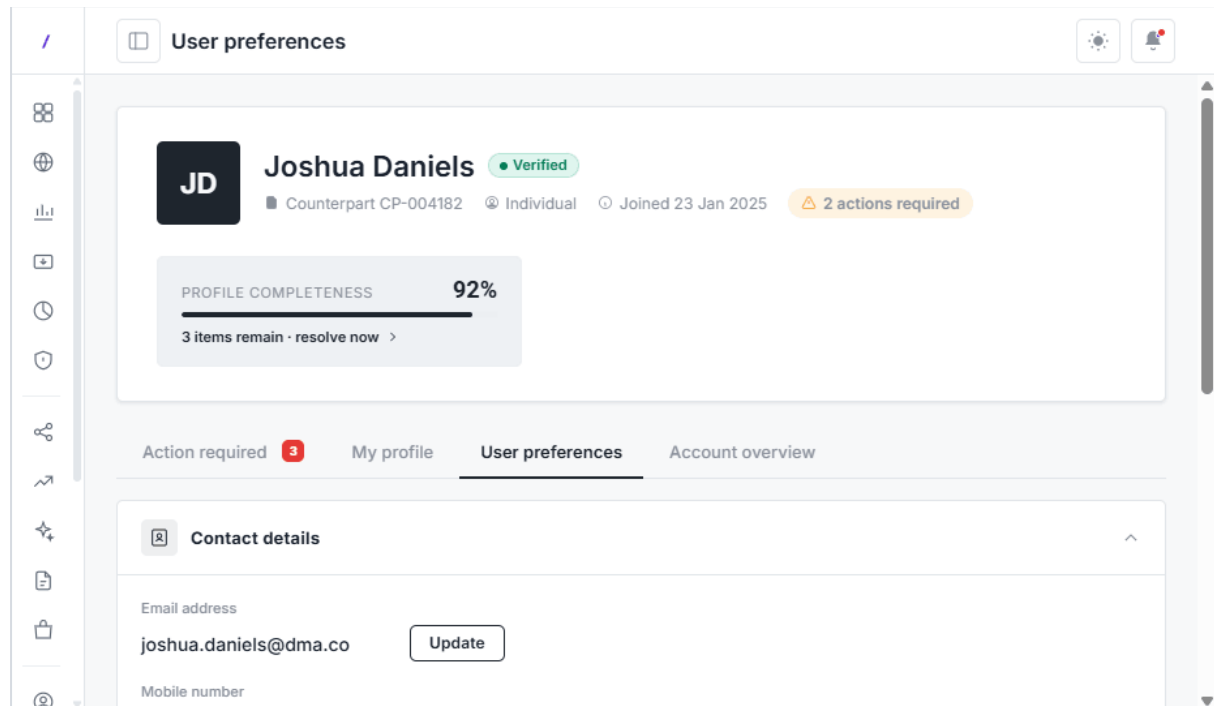


Figure 6 User preferences — contact details and settings

What you will find

- / **Contact details:** your email address and mobile number, each with an **Update** button.
- / **Communication and reporting preferences:** choose how you receive notifications and documents.

Changing your email address

Your email address is how you sign in, so changing it has extra security checks.

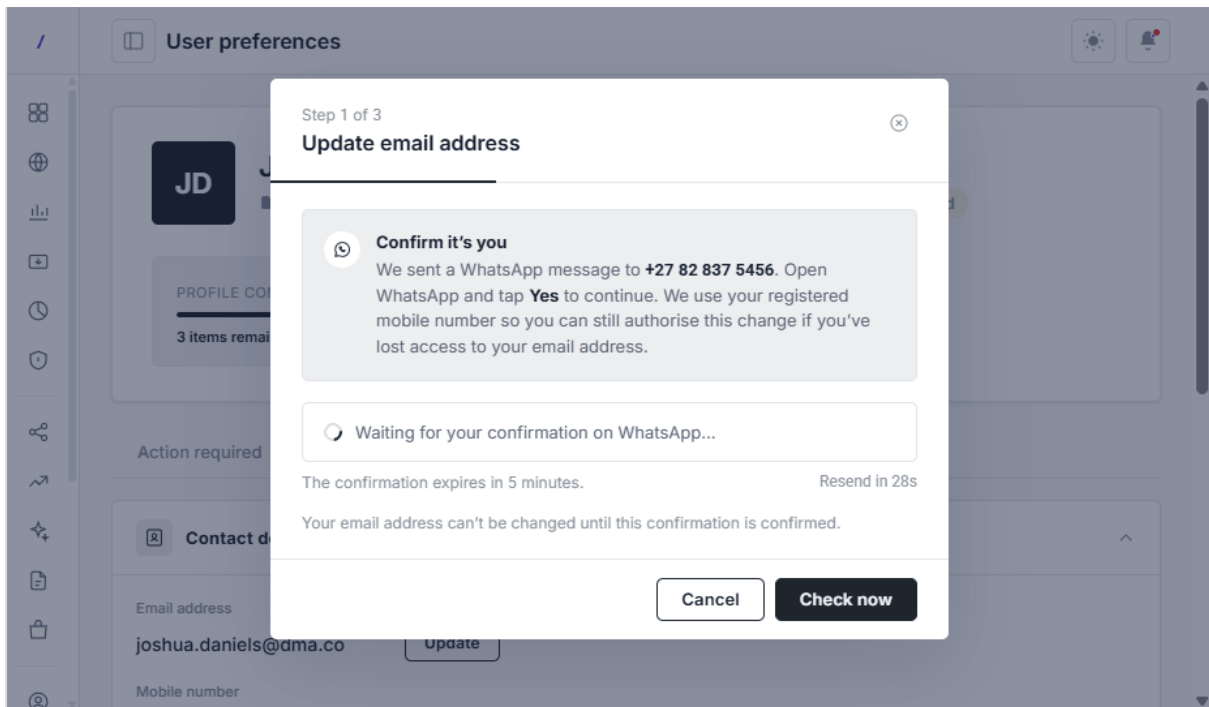


Figure 7 Change email — step 1, confirm it is you on WhatsApp

- 1 Select **Update** next to your email address.
- 2 **Confirm it is you:** a WhatsApp message is sent to your registered mobile number. Open WhatsApp and tap **Yes**. This uses your mobile so you can still make the change if you have lost access to your email.
- 3 **Enter your new email address** and type it again underneath to confirm it.
- 4 **Verify:** enter the 6-digit code sent to your new address, then select **Submit for approval**.

CAUTION

Changing your email address will log you out once the change is approved. Sign back in with your new email address.

9 Support centre

Support centre is where you find answers and contact your client services team.

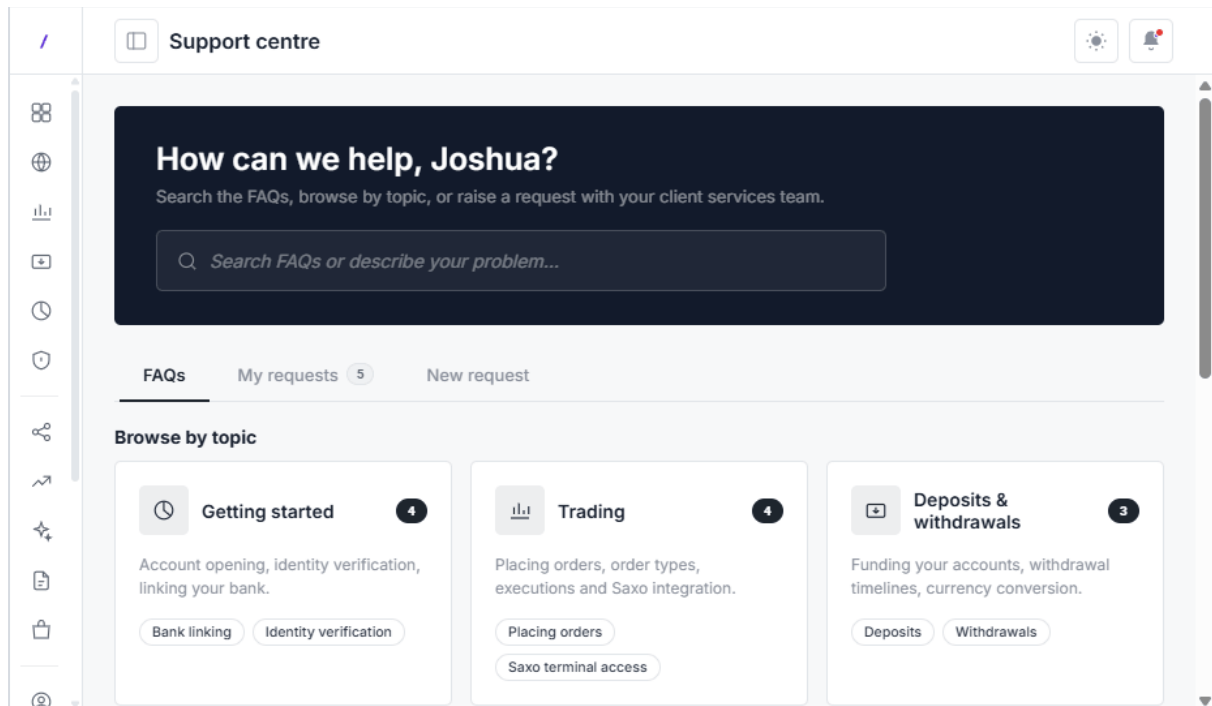


Figure 8 Support centre — search, FAQs and requests

What you will find

- / **Search:** search the FAQs or describe your problem.
- / **FAQs:** browse by topic, such as getting started, trading, or deposits and withdrawals.
- / **My requests:** follow the progress of requests you have raised and reply to your client services team.
- / **New request:** raise a new query.

How to raise a request

- 1 Search for your question first. Most answers are in the FAQs.
- 2 If you cannot find an answer, select **New request**. If you already have open requests, you are asked whether one of them covers your question.

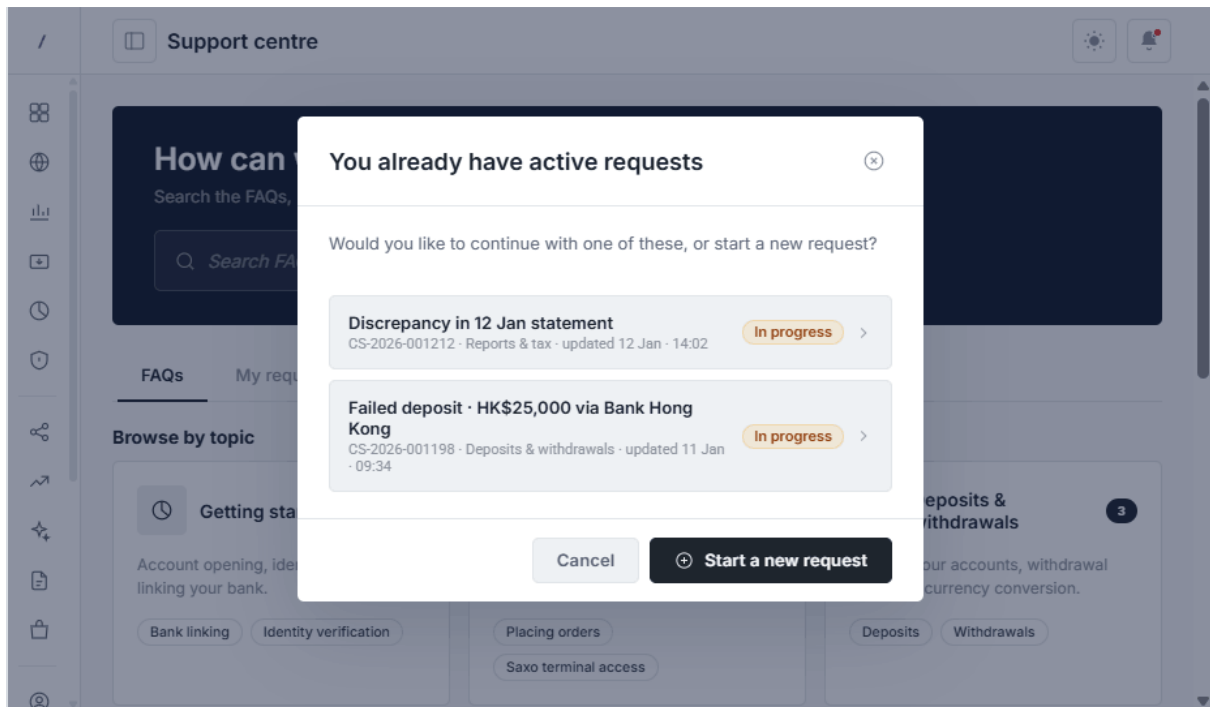


Figure 9 Support centre — check existing requests before starting a new one

- 3 Give the request a short title. In the description, include dates, amounts, account numbers and what you have already tried.
- 4 Submit it, then follow progress and reply under **My requests**.

10 Feedback

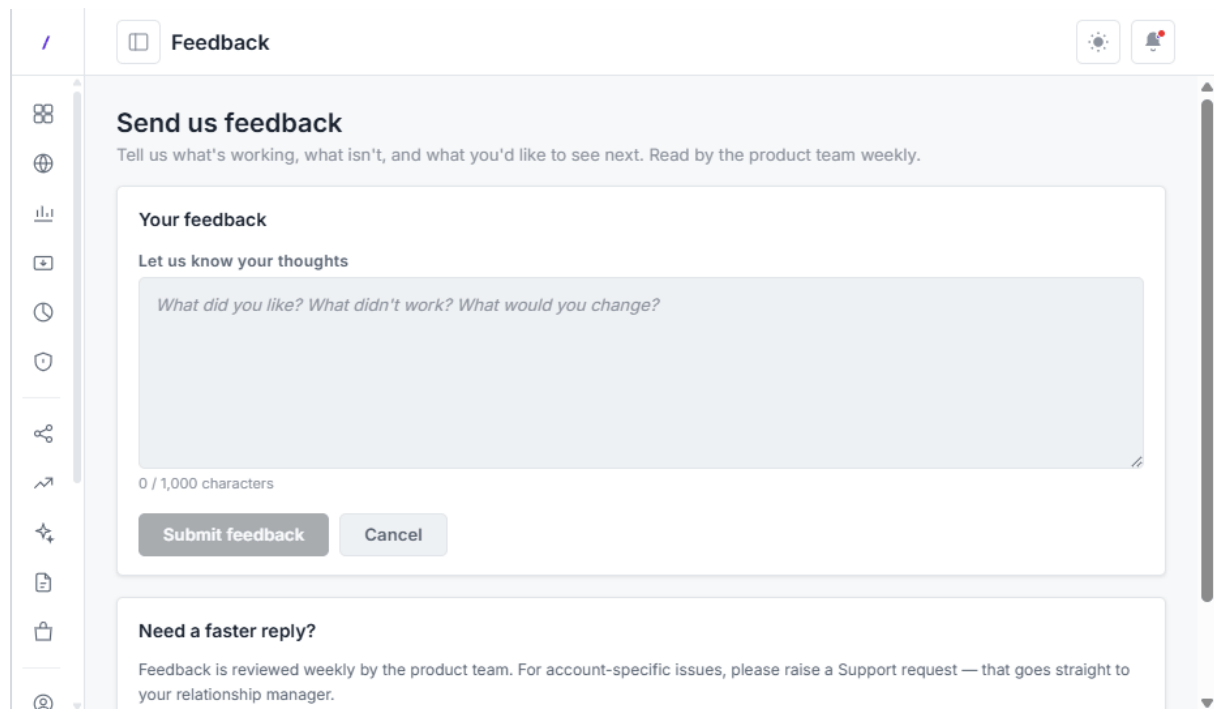
The image shows a web interface for submitting feedback. At the top, there's a header bar with a 'Feedback' tab and some icons. Below this, the main content area is titled 'Send us feedback' with a subtext: 'Tell us what's working, what isn't, and what you'd like to see next. Read by the product team weekly.' The form itself is titled 'Your feedback' and asks 'Let us know your thoughts'. It features a large text input area with a placeholder text: 'What did you like? What didn't work? What would you change?'. Below the input area, there's a character count '0 / 1,000 characters'. At the bottom of the form, there are two buttons: 'Submit feedback' and 'Cancel'. Below the form, there's a section titled 'Need a faster reply?' which states: 'Feedback is reviewed weekly by the product team. For account-specific issues, please raise a Support request — that goes straight to your relationship manager.'

Figure 10 Feedback — tell the product team what you think

Use Feedback to tell the product team what is working, what is not and what you would like to see next. Write your thoughts and select **Submit feedback**. Feedback is reviewed weekly by the product team.

DMA TIP

For anything about your own account, raise a request in the Support centre instead. Requests go straight to your client services team.