

DECEMBER 2019

Premier Portfolio Management Service

Online Valuation Service:
user guide for investors

This document is designed to guide you through some of the key functionality of the Premier Portfolio Management Service online valuation service.

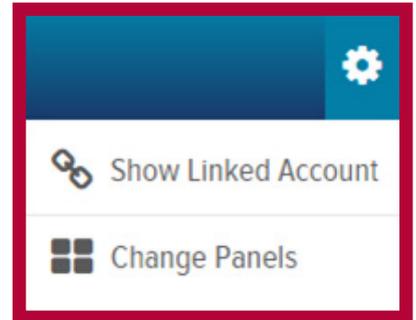
1. Standard functionality

When you first log in you will notice the various control features throughout the portal.



2a. Settings

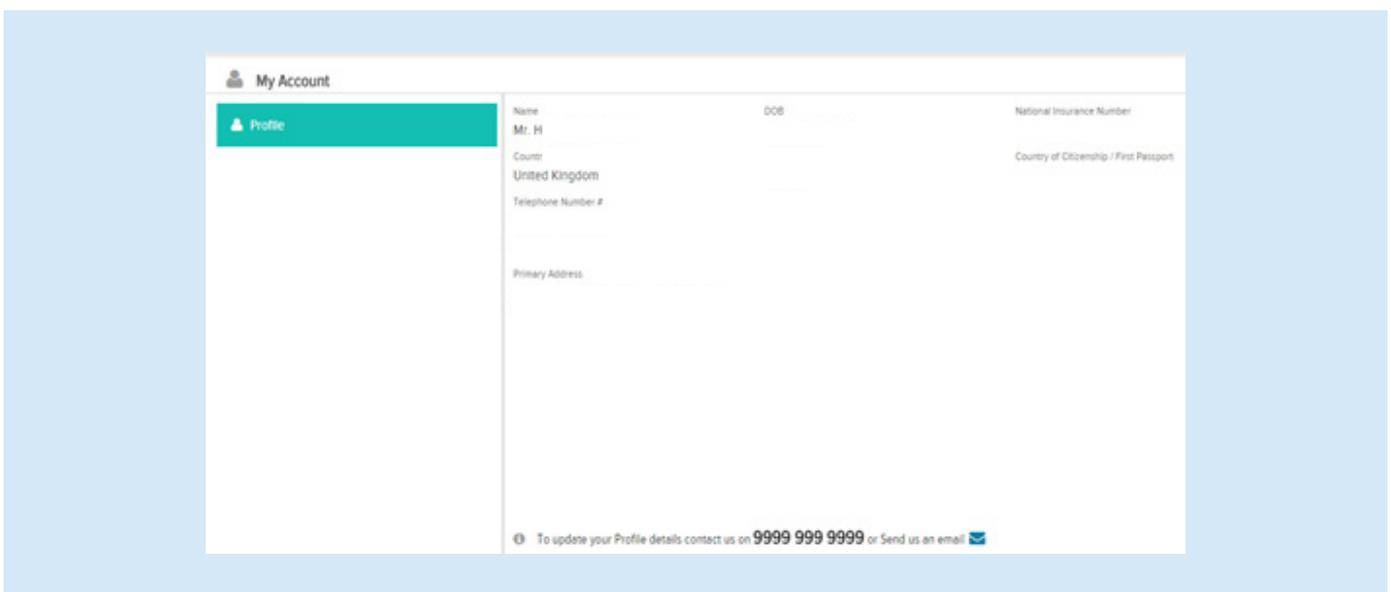
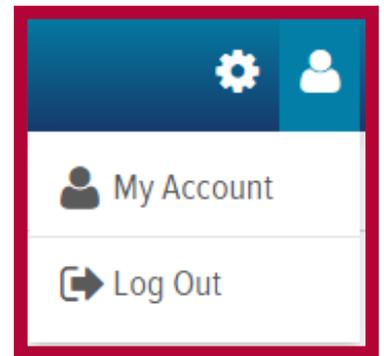
Settings is the first icon of the group at the top right corner of the site. Within **settings**, you can opt to show any linked accounts (if relevant). A linked account is one that doesn't belong to you as the client, but you have been given viewing rights over; perhaps an account belonging to a spouse or a relative. You can also **Change Panels**.



2b. My profile

Here you can **Log Out** and view your account details. Logging out from the Online Valuation Service when you have finished your session is advisable, especially if operating on a shared computer. Clicking **My Account** will take you to your **profile**.

The Profile page will show your personal details. If these need changing, you will need to contact your financial adviser or contact us.





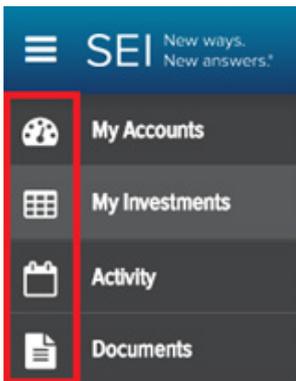
2c. Quick support

The final icon in the controls section is for **support**. This provides you with our contact details.



Clicking on the icon opens the message window, where our email address is shown.

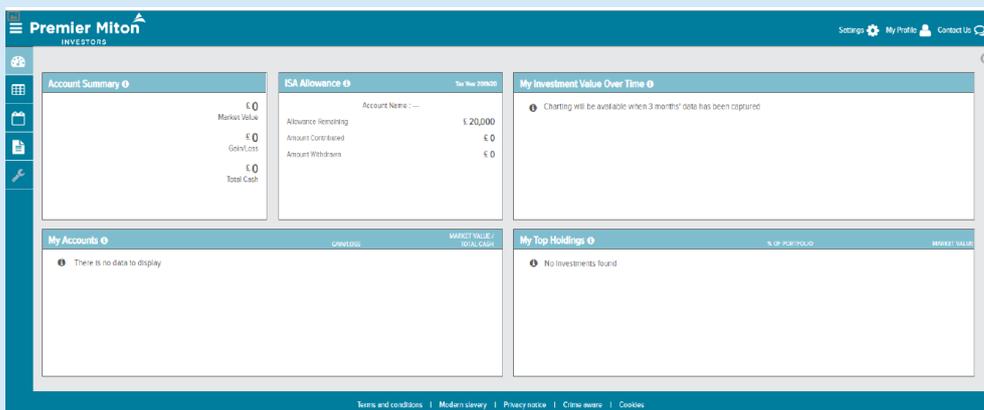
2d. Menu



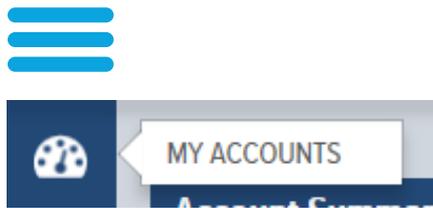
The **menu** is to the far left of the screen. From here, you can access the various other pages in the Online Valuation Service.

3a. Dashboard

Once you have logged on, you will find yourself on the **dashboard** page, this should look similar to the below. Your dashboard will show your specific data.

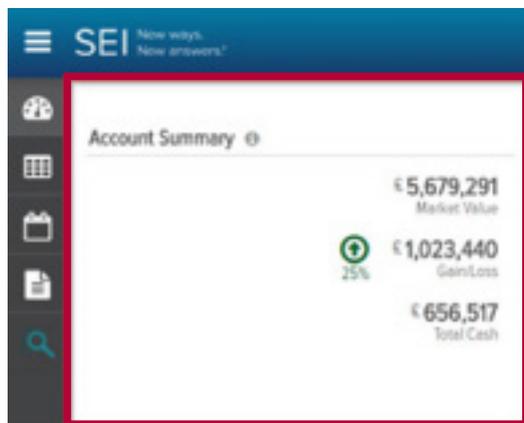


Through various panels within the **dashboard** you may be directed to other pages; at any point you can navigate back to the dashboard by clicking on the top icon (labelled **My Accounts**) under the **hamburger menu**, as illustrated below.



Account summary

The **account summary** panel contains basic information on the combined **current market value** of all your accounts, the **gain/loss** across all accounts and the **total cash** across all accounts. Each of the amounts acts as a **hyperlink** to the **My Investments** page which is described later in this document.



My accounts

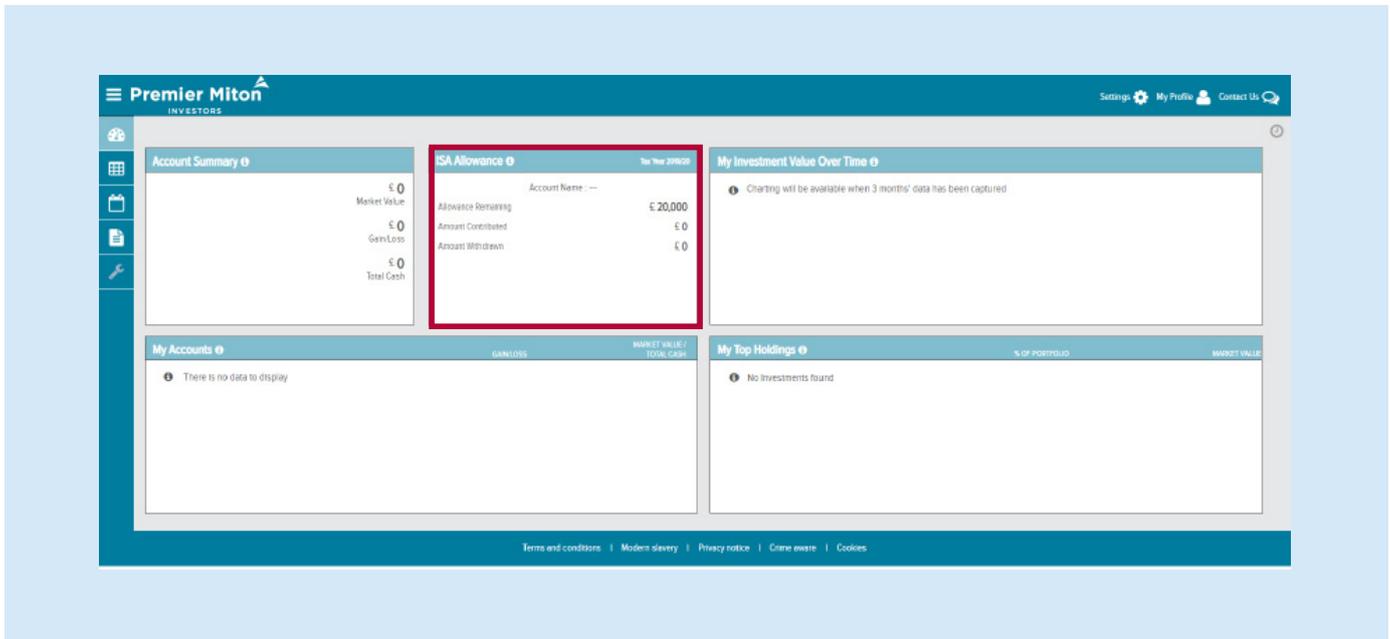
The bottom left panel, **My Accounts**, details the breakdown of your accounts. The information here is as per the Account Summary panel, but broken out across each of the accounts. The account names are **hyperlinks** which will redirect you to the **My Investments** page.

	GAIN/LOSS	MARKET VALUE / TOTAL CASH
 Ms Smith GIA	 £ 1,027,845 51%	£ 3,040,976 £ 14,699
 Ms Smith GIA	 £ -2,407 0%	£ 1,007,592 £ 10,000
 Ms Smith GIA	 £ -2,396 0%	£ 1,003,216 £ 10,125



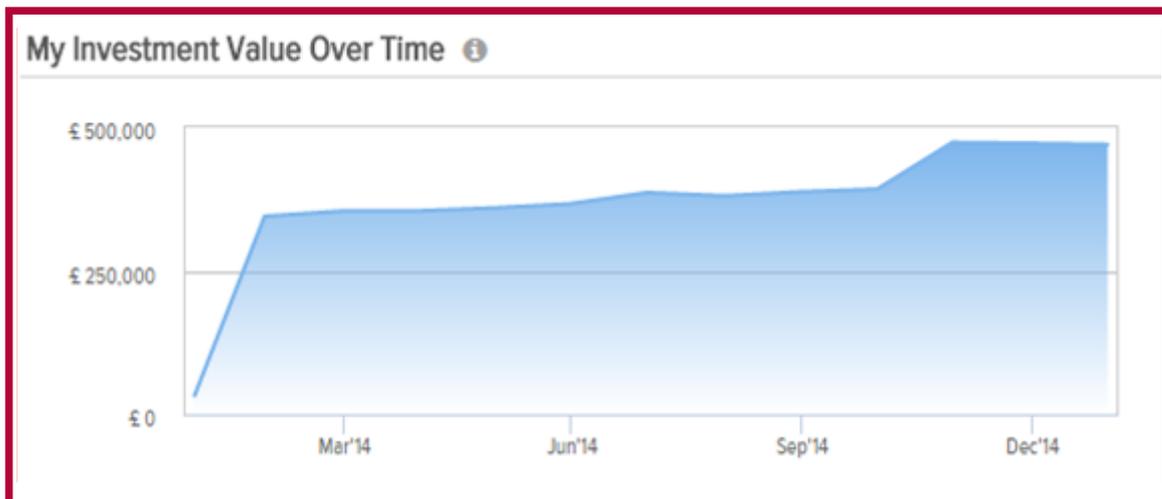
ISA information

The ISA information panel shows the allowance remaining, amount contributed, amount withdrawn, and the time left to invest.



My investment value over time

The **my investment value over time** chart is a graphical representation of the value of your investments over a rolling 12 month time period. By hovering the cursor over any point on the graph you will be shown the value of your investments on a particular month end date.



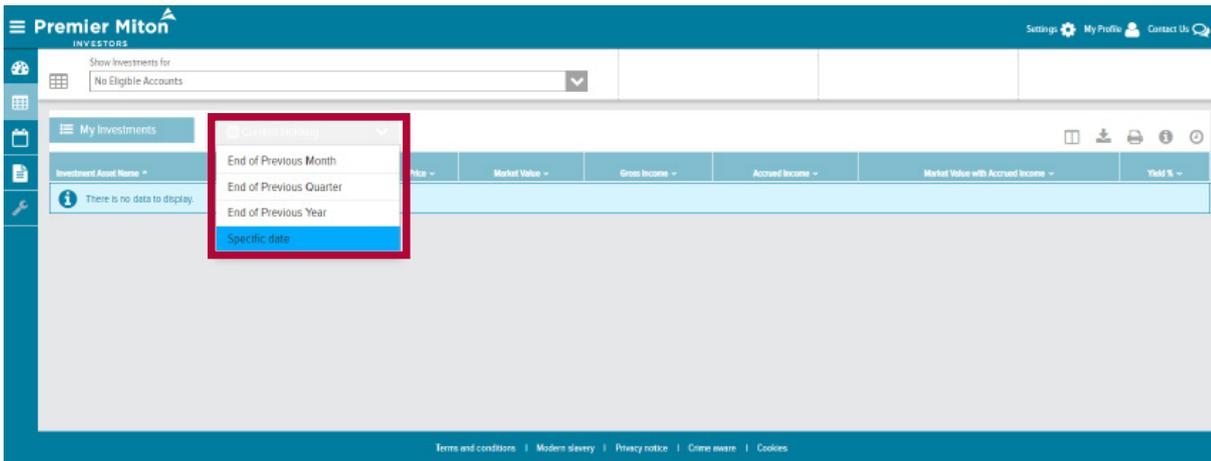
My top holdings

The **my top holdings** panel displays the top five assets you hold by percentage of your portfolio.

My Top Holdings ⓘ	% OF PORTFOLIO	MARKET VALUE
Premier Multi-Asset Conservative Growth Class C A...	41.9 %	£ 30,290
Premier Defensive Growth Class C Inc	31.9 %	£ 23,059
Premier Diversified Class D Inc	14.8 %	£ 10,762
Premier Diversified Income Class D Inc	10.0 %	£ 7,234
Premier Global Infrastructure Income Class C Inc	1.0 %	£ 790

3b. My investments

The **my investments** screen can be navigated to by clicking on the second icon down. You are able to see the current valuation of your account(s) and are also able to backdate to a specific period.

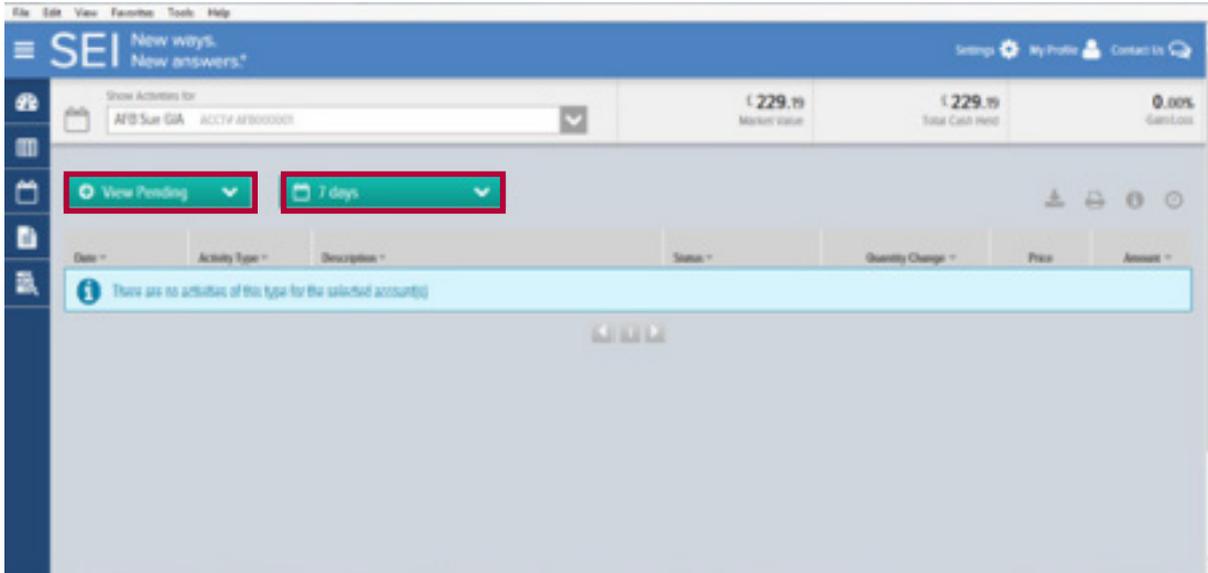


The default view is to show investments for all accounts but this view can be filtered via the drop down menu labelled "Show Investments for". Here you can select individual accounts.



3c. Activity

The **activity** screen can be navigated to by clicking on the third icon down.

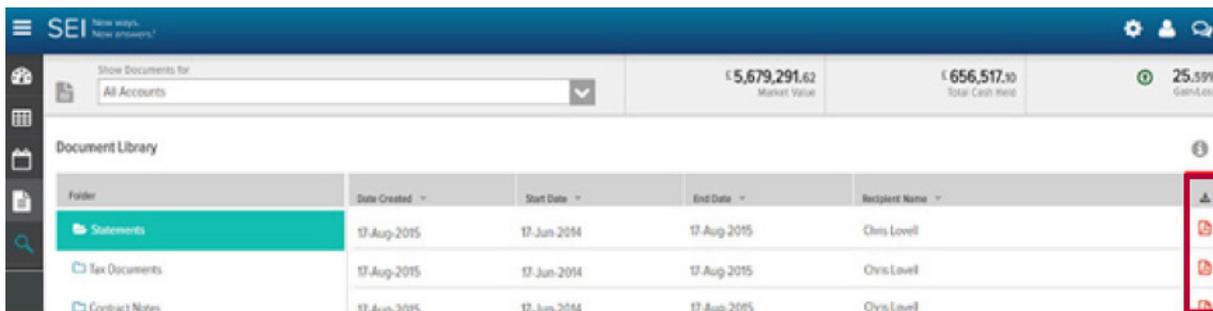


Here you are able to see pending, scheduled and completed activities by selecting these in the drop down menu on the left-hand side. You are also able to filter the time period you wish to view, as shown above.

3d. Documents

By clicking on the fourth icon down labelled 'documents' you will be directed to the **Documents** screen. This screen allows you to view all documents, including contract notes, statements and tax packs, relating to your account(s).

Once you have identified the document you wish to view, you can click on the pdf icon (highlighted in red) in the right-hand column of the table.



By default, you will automatically receive paper copies of your statements. Should you wish to stop receiving paper copies of statements, click on the "My Profile" tab and select "My Account" at the top right hand corner of the screen.

This will take you to a page similar to the below. From this page you can change the Delivery Method to Electronic and save.

The screenshot shows a user profile form with the following fields and options:

- Name:** [Empty text box]
- Country of Birth:** United Kingdom
- Telephone Number:** [Empty text box]
- Email:** [Empty text box]
- Document Delivery Method:** A dropdown menu currently set to "Print" and a "Save" button with a floppy disk icon. This section is highlighted with a red border.
- Primary Address:** [Empty text box]
- DOB:** [Empty text box]
- Marital Status:** [Empty text box]

At the bottom of the form, there is a dark blue footer bar containing the following links: [Terms and conditions](#) | [Modern slavery](#) | [Privacy notice](#) | [Crime aware](#) | [Cookies](#)

Below the footer bar, there is a small line of text: "come from them, can go down as well as up and you could get back less than you invested. The past performance of an investment is not a gui"

Contact us

For further assistance with using the Online Valuation Service please contact **Investor Services** on **0333 456 11 22** or via **investorservices@premiermiton.com**

For your protection, calls may be recorded and monitored for quality assurance and training purposes.

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