WEALTH FOCUS

POWERED BY BOOLERS

FREQUENTLY ASKED QUESTIONS

SECURE, TRACKED & ORGANISED

Section 1:

General Questions

Frequently asked questions

Q. Why should I use Wealth Focus?

A. **Wealth Focus** gives you financial peace of mind, bringing you an overview of your entire financial life in one place. **Wealth Focus** allows you to track the value of investments and assets, alongside any liabilities. Not only that but you have a secure method of communicating with us and we will share documents with you when required. All in one place, safely, and securely.

Q. What is the benefit of using Wealth Focus for messaging?

A. You will be notified when a secure message is sent to you and we are using this method to communicate with you in order that you know the message is genuine because it is being delivered securely by **Wealth Focus** and not sent via email.

Q. What is the benefit of using Wealth Focus for sharing documents?

A. **Wealth Focus** allows for documents to be accessed immediately, without waiting for the postman, and allows you to access the documents when you need them most, wherever you are and on whatever device you are using. We care for the environment too and want to take steps to reduce the amount of paper we're using.

Q. Am I able to upload documents myself onto the Wealth Focus?

A. In app scanning on the app allows you to take a picture of your chosen document and convert it into a PDF, you can then upload this into your document folder or a message.

Q. I have a query regarding the information being displayed in Wealth Focus, who do I contact?

A. In the first instance, please send us a secure message from the Messaging area of the portal, or if it is of an urgent nature please contact your Boolers adviser.

Q. Can I download the documents that are sent to me in Wealth Focus?

A. Yes, you can download any documents, however they are stored within your **Wealth Focus** and can be easily accessed anytime. We would encourage you not to download documents unless you have a specific need, as the documents are stored securely and backed up to ensure the security is maintained at all times.

Q. What is the maximum size document I can add to Wealth Focus?

A. The maximum size document is 5MB.

Q. Who is moneyinfo?

A. moneyinfo Limited has developed and maintains **Wealth Focus** and is our chosen technology partner. More information can be found here www.moneyinfo.com

Q. I cannot remember my log in details, what can I do?

A. If you have forgotten your password, go to the login section of http://wealthfocus.boolers.co.uk and input your e-mail address to reset your password. An email will be sent to you containing a link allowing you to validate yourself by responding to security questions and then to reset your password. Once you have logged in to **Wealth Focus** you will be able to amend your username, password or security questions by clicking on me > Settings.

Section 2:

SECURITY

Frequently asked questions

Q. How secure is it?

A. As you would expect, cyber security is of the utmost importance to us and our carefully selected technology partners. All data within **Wealth Focus** is fully encrypted and accessible via multi-factor authentication, together with other security measures to ensure your data is protected at all times.

Q. Here's the technical bit...

A. All information is securely sent and received encrypted, which means that information cannot be read by anyone listening between your computer and the **Wealth Focus** service. Even when we process any of your data internally, we still encrypt it.

Our technology partner moneyinfo protects its infrastructure in several ways using advanced technologies and also using a Security Operations Centre (SOC), which monitors what happens in our environments 24/7/365. This means if something looks suspicious, our SOC will inform us immediately. Also, your data is stored in an environment located in an ISO27001 certified facility, that is protected by the very best in physical security, electronic security and internal security policies to ensure that your details remain totally secure.

The infrastructure is designed in such a way to allow for high availability; if there is a blip and something goes wrong in the facilities, a spare piece of the environment automatically picks it up, which ensures that you can still access your information seamlessly.

Q. How private is my data?

A. Your privacy and trust are our highest priority and so we put extensive safeguards in place to protect your identity, privacy and financial data at all times. When you add your own information on to **Wealth Focus** you can decide who it is shared with using the privacy controls.

Q. Is my data protected under the Data Protection Act?

A. Boolers strictly adheres to the General Data Protection Regulation and the Data Protection Act (DPA 2018), so you can be assured that any data, documents or messages are kept safe and secure with rigid data protection principles in mind. We do not share any data or information with third parties, unless given explicit consent by you.

Q. What happens to my data if I no longer use Wealth Focus?

A. If you decide to no longer be a client of Boolers then your **Wealth Focus** access will be revoked. You will have an opportunity to download your data in line with the regulatory requirements. All data will be completely deleted from the servers after 30 days from the deletion of your account.

Section 3:

Financial Portfolio

Frequently asked questions

All plans that Boolers hold in our system will be automatically added to Wealth Focus for you. However, should you also wish to add any other assets or plans that are not managed by us, you can do this by following the steps set out below.

Q. How are my Boolers plans updated in Wealth Focus?

A. Any investment or pension plans managed by Boolers will be updated either by electronic data feeds or by the team dependent on the data available from the providers of your plans. The valuation 'strength' is indicated alongside each plan using a 'wifi' style signal indicator.

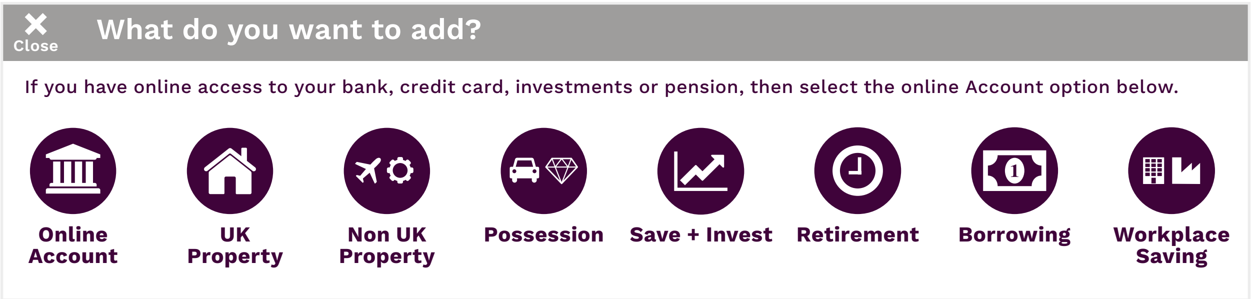
Saving & Investments £278,835

An ISA - PR 1000292	£51,768.17
Investment Plan - HARX007831	£28,941.80
MyThanks Portfolio	£198,125.00

- Three bars mean that the unit price and unit holdings are being updated via an electronic data feed from your provider and should always be up to date.
- Two bars mean that the unit prices are being updated via a direct price feed, but units are being manually updated periodically by the team at Boolers so may not be up to date.
- One bar means that the value of the item is manually updated occasionally by the team at Boolers or are not looked after by them and so may be an estimate.

Q. How do I add an investment or pension plan to Wealth Focus?

A.
- Navigate to Net Worth
- Click ➕
- Choose the correct option from the list i.e. Save + Invest or Retirement



Once you have entered the information you can click on Save and your investment or pension will be added to the portal.

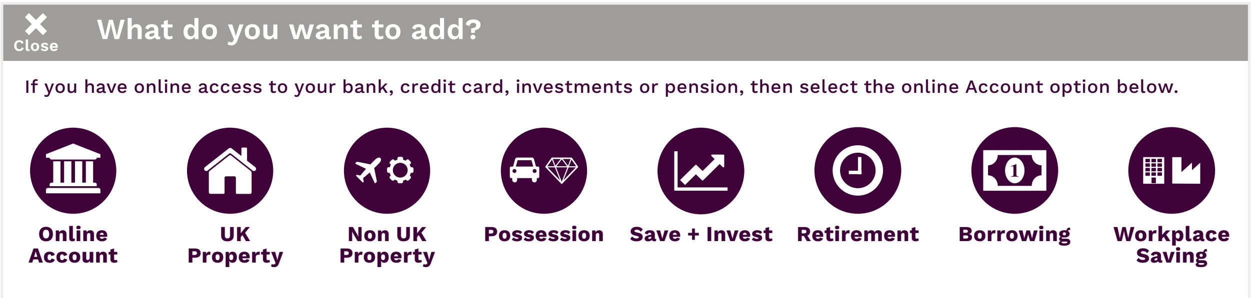
Q. How do I add an insurance policy to Wealth Focus?

A. To add details of any insurances you hold:
- Navigate to Insurances
- Click ➕

Choose the correct type of protection and follow the screen prompts to enter the data required.

Q. How do I add my property details to Wealth Focus?

A.
- Navigate to Net Worth
- Click ➕
- Choose the UK Property option from the list below



Enter your house number/name and postcode and click on the magnifying glass, if your property address, purchase date and price are populated, you can click on save, if no data is returned, this can be added manually.

Once you have entered the information you can click on Save and your property will be added to the portal. You can adjust the value if required, otherwise our house pricing data feed will update the values monthly*.

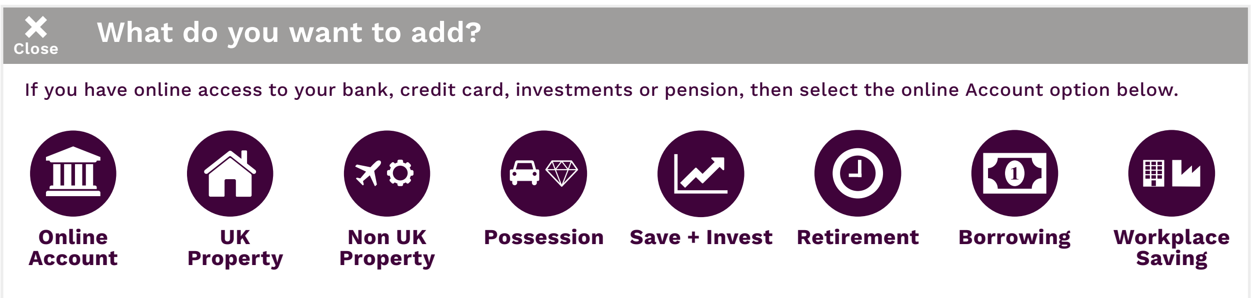
*Valuation data for properties is uploaded quarterly.

Q. How is my property value worked out?

A. We use a third party to provide house price valuation data which uses sold prices in the area and works out averages according to the location.

Q. How do I add an asset or liability to Wealth Focus?

A.
- Navigate to Net Worth
- Click ➕



Choose the category for the item you want to add and follow the on screen prompts.

Q. How do I edit or delete an item that is already showing on Wealth Focus?

A. You can only amend or delete items that you have added yourself by accessing the item and clicking in Edit Details. If you believe there to be something added by Boolers that should not be showing, please contact Boolers by sending a secure message with your query.

Statement - These FAQs should be read in conjunction with T&Cs and Privacy Policy.

Access your online portal today
WEALTHFOCUS.BOOLERS.CO.UK

Call 0116 240 7070

Email wealthfocus@boolers.co.uk

Visit boolers.co.uk

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Available on the App Store

ANDROID APP ON Google Play