

# Personal Finance Portal

**WALKERCRIPS**  
Financial Planning

Giving you access to your finances 24/7



Image by drobotdean on Freepik

**Welcome to your new Personal Finance Portal (PFP)** – the revolutionary app that gives you access to view all your finances in one place 24/7 on any mobile or web device. PFP enables you to view your fund information and financial portfolio at the click of a button. So, whether you're looking for an up-to-date valuation of your portfolio or want to assess how you're progressing against your goals, your new PFP has it covered.

- ✓ A convenient way to view finances online **24/7**
- ✓ Always **up-to-date** and easy to use
- ✓ Peace of mind that it's completely **secure**
- ✓ **Accessible document storage** wherever and whenever you need to access it
- ✓ A **sustainable** alternative to paper documents

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## 21st-century services

We recognise that advances in technology mean our clients are increasingly choosing to interact with us across multiple channels; face-to-face, on the telephone and online. That's why we're introducing our Personal Finance Portal, a revolutionary new app that enables you to see your complete financial picture in seconds at a time and place to suit you.



## Peace of mind with bank-level security

What's more, everything is completely encrypted, meaning that you can communicate with us using the inbuilt messaging service safely and securely.



## A convenient way to view finances at the click of a button

Accessible online 24/7 across desktop, laptop and mobile, including a progressive web app, Personal Finance Portal gives you access to your long-term savings and investment information in an easy-to-use, online format.



## Accessible document storage that's second to none

Your Personal Finance Portal allows you to house all your documents, both financial and personal, in a single online vault that's completely secure and fully backed up. It's far safer than keeping paper copies in your filing cabinet or in a computer file which can be hacked.



## Always up-to-date and easy to use

Accounts, transactions and balances are refreshed every day, so the information displayed in your Personal Finance Portal is always up to date\* and is displayed in a visually engaging way that's easy to understand. Because your Personal Finance Portal is cloud-based, getting up-to-date valuations becomes a breeze so you can always see how your investments are performing. *\*where applicable*



## Increase sustainability

Walker Crips is committed to reducing our carbon footprint across our business, by engaging our clients and staff and continually reviewing our business practices, operations and supply chain. By introducing the Personal Finance Portal as a digital alternative, we are hoping to significantly reduce unnecessary paper consumption, and make it easier for our clients to adopt more sustainable practices.

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CLIMATE COMMITMENT

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