How to register and log in to the online Customer Centre

User Guide
You can view your Quilter accounts using our online Customer Centre. This guide explains how to register and log in.
The online Customer Centre is our online service that helps you stay closer to your investments, enabling you to access valuations and correspondence online whenever you need to. It’s quick and easy to register and login.

New to Quilter?
We do all we can to ensure everything runs smoothly when setting up your new account. This process can take up to 24 hours. Therefore when, as a new customer, you receive an email from us inviting you to register for the online Customer Centre (oCC), please leave it until the day after you receive that email to register for the oCC. This helps make sure your registration is set up correctly.

Want to register as a non-private customer?
If yes you will need to contact us so we can match up the registration to the correct account. We classify a non-private customer as anyone other than a private individual owning their own account. For example, this could be a corporate, trustee, power of attorney, or interested party. If that is the case please call us on 0808 171 2626 or email ask@quilter.com
Registering for the online Customer Centre is the easiest way to stay up to date with your investments, enabling you to access valuations and correspondence online whenever you need to. The following steps outline how quick and easy it is to register and login.

1. Go to platform.quilter.com/customer and click on ‘Register’.

Alternatively search for ‘Quilter’. Click on the main ‘Quilter’ link. Make sure you are on the ‘Customer’ tab at the top of the page. Then in the top right hand corner of the page click on the ‘Activate online account’ link.
1. Select the **Start** button. You just need one of the following forms of identification to hand, your driving license, passport or electricity bill.
Account registration: your details

1. Enter your name and date of birth.

2. Enter your postcode and select ‘Find address’, or enter your address manually.

3. Enter your phone contact details.

4. Enter your email address.

   Top Tip:
   Use exactly the same name format and spelling you have used on your investments.

5. Select ‘Next’.
Registration: verify your identity

To keep your financial information secure, we need to verify your identity by asking for details from a document you may have.

1. Select the type of document you are using.

2. If you do not have any of these forms of identification, tick here. You can contact us at the end of the process and we will help you to complete your registration.

3. Enter the required details from the document, such as your passport number.

4. Select ‘Next’.
Registration: username and password

1. Create your username which must contain at least six characters.

2. Create your password which must contain at least one lowercase letter, one uppercase letter, one number and be at least 8 characters long.

3. Select 'Next'.
1. As an extra security measure to help keep you safe each time you log in, we'll show you a memorable picture and phrase to prove you are on our online service before you access your account. You can use the picture and phrase we've provided or pick your own.

2. Select ‘Next’.
Registration: activation email

1. We will send an activation email to the email address you provided when you registered with us.

2. At the same time we will send a registration code to the phone number you have registered with us. Please enter this code on our website.

3. Please click on the link in the email to activate your account. A registration page displaying the memorable picture and phrase you have chosen will open.
1. Your memorable picture and phrase will be displayed so you know that it is us. Enter the verification code we have sent to your phone and click ‘Confirm’.

2. If you did not get a code you can click here to request a new one. It may take up to 30 seconds for the code to come through.

3. Once you click confirm you have completed the registration process. If in the unlikely event you have any problems and you cannot complete the registration process please call us on 0808 171 2626.
How to log in and update your details (including forgotten password or username)
My accounts page: log in

1. Once you have completed the registration process, to log in to your online account, go to our website, platform.quilter.com/customer and enter your username.

2. The memorable picture and phrase you registered will be displayed. Enter your password and click 'login' to log in. You may be asked to accept our updated Terms and Conditions before continuing to the online Customer Centre.
I have forgotten my username

1. If you have forgotten your username when logging in, then click the 'I've forgotten' link on the Customer Centre logon page.

2. When the forgotten username screen comes up, enter your registered email address in the box then press 'continue'.
I have forgotten my username

3. We will email you your username and you will see the confirmation message. Once you have the email with your username, log in by clicking the 'log in' button.
I have forgotten my password

1. Enter your username in the ‘Username’ field, then select ‘Next’

2. On the enter password screen select the ‘I’ve forgotten’ link.
I have forgotten my password

3. You will receive a message to confirm that an email has been sent to your registered email address. You will need to click on the link in the email once you’ve received it and then reset your password.
You can update your security and address details as well as your correspondence preference details using the 'My details'\(^{(1)}\) option at the top of the account overview page.

- **Security details**\(^{(2)}\) – this allows you to update your email address as well as your password and security details.
- **Residential address**\(^{(3)}\) – this shows your current residential address and can be amended using the update button on the right.
- **Correspondence address**\(^{(4)}\) – this shows the address we use for correspondence and can be updated like your residential address using the update button. This shows whether it is the same as your residential address.
- **Correspondence preference**\(^{(5)}\) – you can choose to receive correspondence online only, or online and by post. Certain regulatory documents will always be sent by post. Your current preference is displayed on the screen and can be changed using the ‘Update correspondence preference’ button on the right.
Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively.

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