

abrdn Wrap

Getting started with the portal

abrdn.com

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Introduction

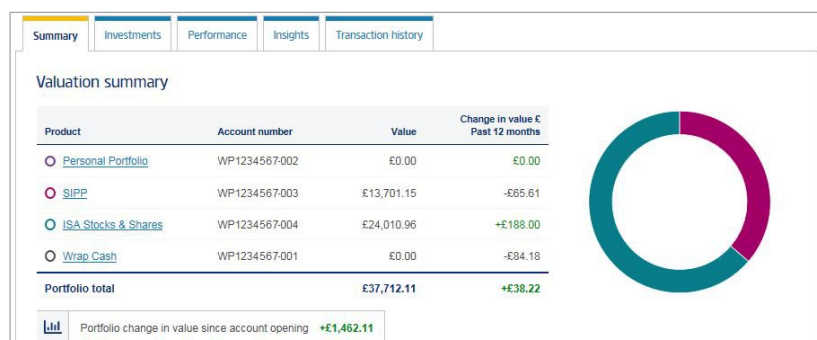
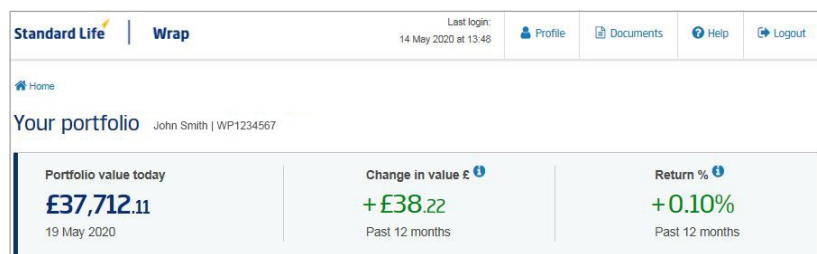
Welcome to the online portal for your abrdn Wrap account. This guide will take you through how to register for the first time and login, using our security partner Okta. Security is important to us and Okta are a market leader in managing secure online access.

Once registered, you'll be able to log in and view your Wrap account whenever it suits you. You can quickly get hold of the information you need to keep track of your investments.

The value of your investments can go down as well as up, and you could get back less than you paid in.

With the portal you can:

- see a quick summary view of your portfolio
- view up-to-date valuations, product details and documents
- access on your desktop, tablet or mobile
- reset the password and unlock account if needed.

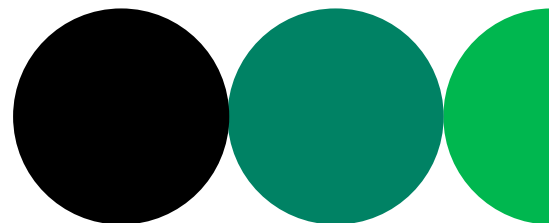


This example is for illustrative purposes only. No assumptions regarding future performance should be made.

"You can quickly get hold of the information you need to keep track of your investments"



Registering for the portal



Portal access email

Before logging in for the first time, you will need to register first.

We'll send you an email confirming your access to the portal and explain how to get started. An example registration email is shown to the right.

Once you've received this email, you can register by clicking the link through to our security partner, Okta. This will take you to the Okta website to complete the registration process.

Please note, the registration link is only available for 72 hours after the email is sent. You can request another email if the registration link has expired.

Name, we're pleased to let you know that you can now register securely online to view your abrdn Wrap account.

We've improved our online services to ensure they meet the latest online security standards and we're now partnering with leading firm, Okta to provide the latest security technology.

Once you register securely through Okta, you can login to view your latest Wrap valuation, investments and plan documents.

But first, we need to get you started:

1. You'll need to register your with our security partners OKTA by clicking here: Register with OKTA. Note, a personalised hyperlink will be sent on your email.
2. Okta will send you an email to verify your email address which completes the registration process.
3. Once you have your Okta identity, please use to navigate to your login page and select 'Client Login' and save this address for future use.

Having trouble registering?

View our user guide for step-by-step support.

Any questions? This is a genuine email from abrdn. If you have any questions or concerns you can contact your financial adviser aligned to your abrdn Wrap account.

Click [here](#) if you'd like to find out more about Okta and why we've partnered with them before you register.

How do I register?

After clicking "Register with Okta" from the Portal Access Email, you will see the registration step.

The email address will pre-populate with the one we already have registered for you and will be part of your login.

Please note, this email has to match the one we hold for security reasons. Your email address can be changed later if required.

Your password must be at least 12 characters long. There are no restrictions on the characters you choose, but we have checks in place to make sure your password is strong. Your password won't expire and can be changed at any time. Page 9 of this guide explains how to do this.

The screenshot shows the Okta 'Create Account' page. At the top is the Okta logo. Below it is the heading 'Create Account'. A blue box contains the text 'Your Platform email address will be pre-populated here'. Below this are three input fields: a password field with a lock icon, a 'First name *' field, and a 'Last name *' field. A note below the fields states '* Indicates required field'. At the bottom is a large blue 'Register' button and a link for 'Back to Sign In'.

Logging in to the portal

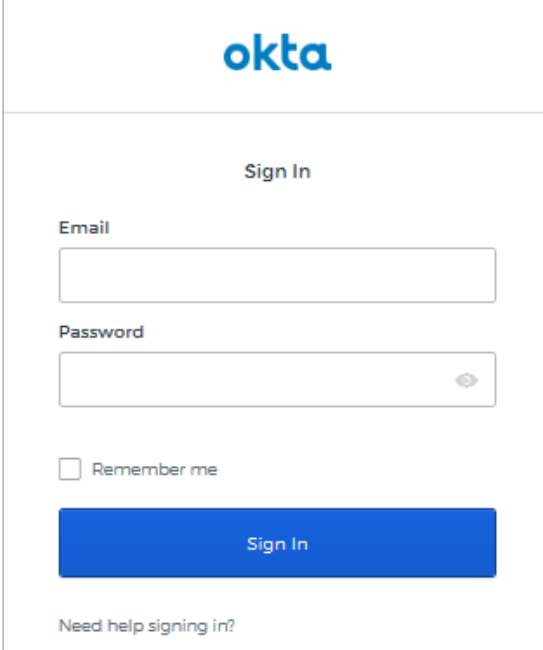
How do I login?

Once you've registered you will receive a verification email. You should click on the link to take you to the next step. This verifies your identity.

Enter your email address and password to enter the portal.

There is a link to get help on this screen if you have forgotten your password.

There is also a facility to unlock your account if you make more than five unsuccessful attempts. You'll receive an email giving you the steps to follow.

A screenshot of the Okta Sign In page. At the top is the Okta logo. Below it is the heading "Sign In". There are two input fields: "Email" and "Password". The "Password" field has an eye icon to toggle visibility. Below the fields is a checkbox labeled "Remember me". At the bottom is a blue "Sign In" button. Below the button is a link that says "Need help signing in?".

okta

Sign In

Email

Password

☐ Remember me

Sign In

Need help signing in?

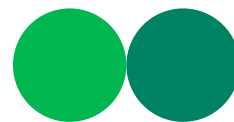
Email addresses

Are there any restrictions on email addresses?

Please enter the email we hold on record for you when you first register for the portal. This is the email address that we sent your registration email to. You can update your email address later, once you've logged into the portal.



Summary page



What will I see first?

The first screen you will see is a summary view of your portfolio. This shows your total portfolio valuation at today, the change in value (monetary and percentage) over a 12 month period (or from when you first opened the account if earlier) and a breakdown of the products you hold.

Standard Life

Wrap

Last login:
14 May 2020 at 13:48

Profile

Documents

Help

Logout

Home

Your portfolio John Smith | WP1234567

Portfolio value today
£37,712.11
19 May 2020

Change in value £
+£38.22
Past 12 months

Return %
+0.10%
Past 12 months

SummaryInvestmentsPerformanceInsightsTransaction history

Valuation summary

Product	Account number	Value	Change in value £ Past 12 months
Personal Portfolio	WP1234567-002	£0.00	£0.00
SIPP	WP1234567-003	£13,701.15	-£65.61
ISA Stocks & Shares	WP1234567-004	£24,010.96	+£188.00
Wrap Cash	WP1234567-001	£0.00	-£84.18
Portfolio total		£37,712.11	+£38.22

Portfolio change in value since account opening **+£1,462.11**

Product details

Personal Portfolio WP1234567-002

Value today **£0.00**

Next regular payment in **None**

Next regular withdrawal **None**

[View Personal Portfolio details >](#)

SIPP WP1234567-003

Value today **£13,701.15**

Last regular payment in (Gross) **None**

Next regular income payment **Not currently available**

[View SIPP details >](#)

ISA Stocks & Shares WP1234567-004

Value today **£24,010.96**

Next regular payment in **None**

Next regular withdrawal **None**

ISA allowance remaining **£20,000.00**

[View ISA Stocks & Shares details >](#)

Wrap Cash WP1234567-001

Value today **£0.00**

Next regular payment in **None**

Next regular withdrawal **None**

[View Wrap Cash details >](#)

This example is for illustrative purposes only. No assumptions regarding future performance should be made.

Documents

Can I see my documents on the portal?

There is a document library on the portal which will store copies of your important Wrap account documents. Just click on 'Documents' at the top of the page.

The screenshot shows the 'Your documents' page on the Standard Life Wrap portal. The header includes the Standard Life and Wrap logos, the last login time (19 May 2020 at 16:18), and navigation links for Profile, Documents, Help, and Logout. The breadcrumb trail shows 'Home > Documents'. Below the header, there's a 'Literature & guides' section with a link to view the latest terms & conditions. The main content area features a filter section with 'Document type' (a dropdown menu), 'Date' (a dropdown menu set to 'Past year'), and a date range 'From 20 May 2019 until 19 May 2020'. Below the filters is a table with columns: Date, Type, Document, and Download. The table lists two documents: 'Cost and Charges Disclosure' (dated 09/02/2020, Type: Document) and 'SL Annual Statement' (dated 12/01/2020, Type: Reports). Each document has a download icon.

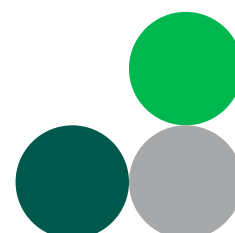
Date	Type	Document	Download
09/02/2020	Document	Cost and Charges Disclosure	
12/01/2020	Reports	SL Annual Statement	

Security details

How do I update my password?

In the Profile area of the portal, there is an option to update your security details.

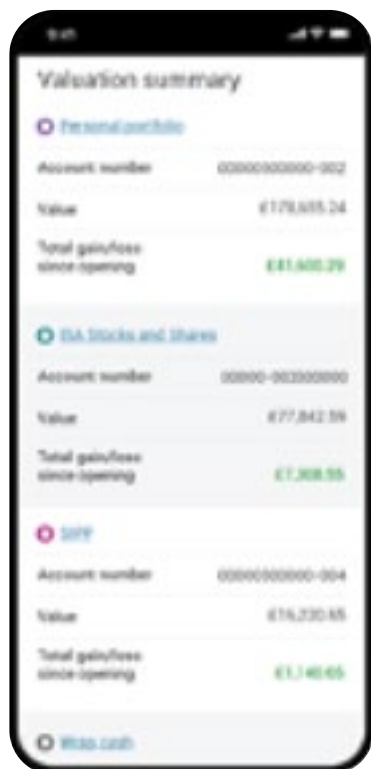
The screenshot shows the 'Your profile' page on the Standard Life Wrap portal. The header is identical to the previous screenshot. The breadcrumb trail shows 'Home > Profile'. Below the header, there's a 'Your profile' section with three tabs: 'Personal details', 'Account details', and 'Security details' (which is highlighted). The 'Security details' section contains a lock icon and the text: 'You can change your password online through our secure services with Okta.' Below this text is a 'Change password' button with an external link icon.



Mobile view

Can I view the portal on my mobile device or tablet?

The portal is fully mobile responsive. You can login using the internet browser on your device.



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Can I add the portal to my mobile device home screen?

Yes, devices have the option to save the Welcome/login page URL as an icon to provide quick access to the mobile site.

You will be responsible for entering a username and password. It's the device that makes this login easy and allows username/password to be saved on the device and then re-used when the portal requests it. These are normally validated by using the security on the device (e.g. face ID or touch ID).



Further support

If you have any questions or need further support, please contact your adviser firm.

For more information visit abrdn.com/adviser

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