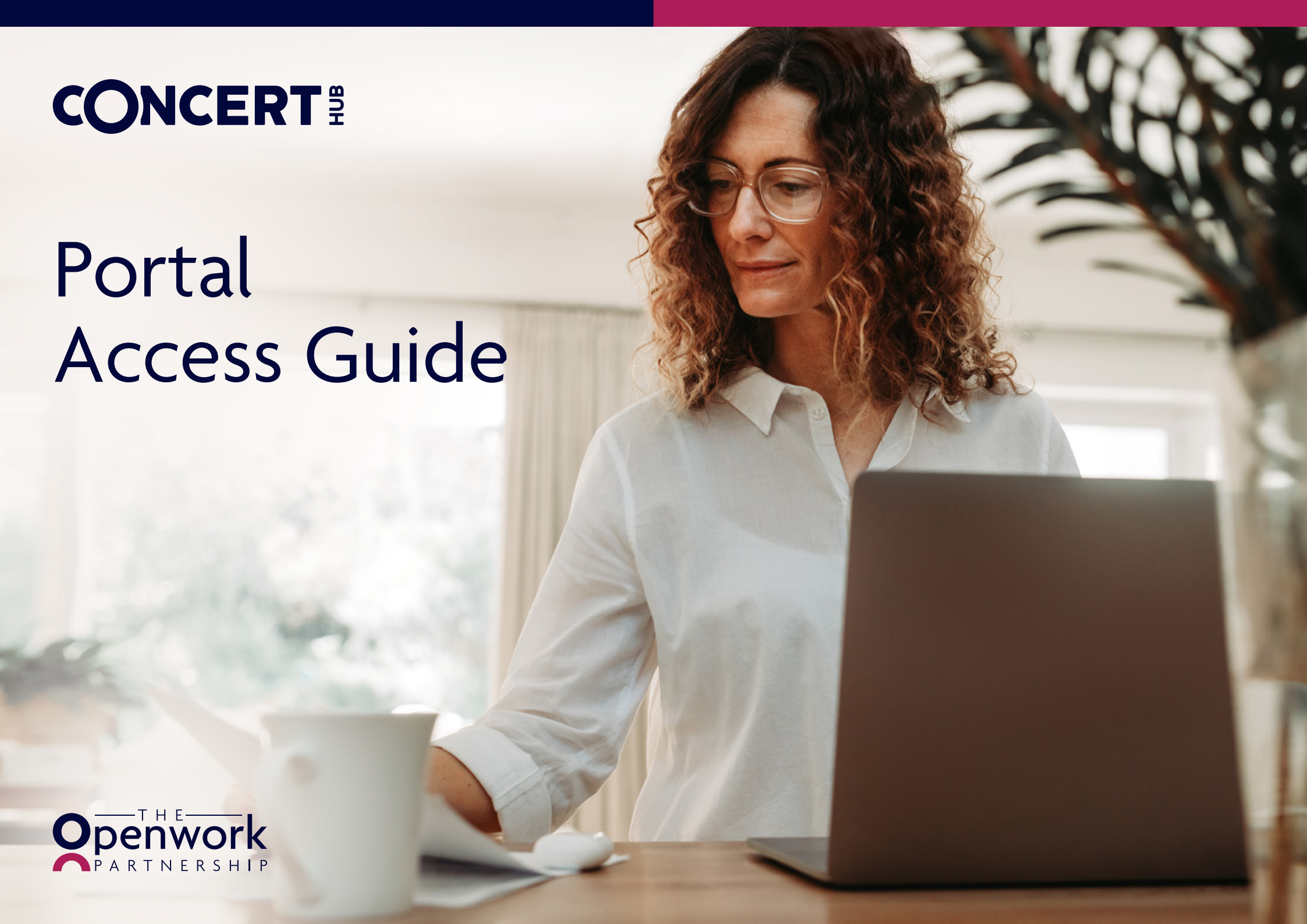


CONCERT HUB

Portal Access Guide



Contents

- Introduction >
- How to register, create and validate an account >
- How to navigate portal content >
- How to update your details in the Client Portal >
- How to view and upload documents >
- How to approve documents >
- How to complete the Attitude to Risk questionnaire >
- How to sign into the portal once you've registered an account >
- What to do if you forget your password >

Introduction

The Client Portal is an interactive, web-based support tool to help with communication and provide a secure way of sharing information and documentation between Advisers and Clients.

This guide is designed to provide step-by-step instructions for Clients on how to use the ConcertHub Client Portal. The Client Portal has been designed to be intuitive; however, some Clients may prefer to work their way through this guide when familiarising themselves with the system.

How to register, create and validate an account

Other steps

- [Introduction](#) >
- [How to navigate portal content](#) >
- [How to update your details in the Client Portal](#) >
- [How to view and upload documents](#) >
- [How to approve documents](#) >
- [How to complete the Attitude to Risk questionnaire](#) >
- [How to sign into the portal once you've registered an account](#) >
- [What to do if you forget your password](#) >

How to register, create and validate an account

Before you can use the portal, you will need to register and create an account. You will receive an email to the address that you provided to your Adviser. The email response that you receive will be dependent on initial or previous registration to the portal. To access the portal, click on the link in the email to take you directly to the sign-in page.

If you are being given access for the first time you will receive the following email;

If you already have portal access given to you by another Adviser, you will receive the following email; **Please note, for the best functionality, please use either an IPAD, tablet, laptop or desktop computer to access, rather than a mobile phone.**

Subject: Openwork Client Portal Invite CRM:0159897

Dear Mr Client,

As discussed, I'd like to give you access to the Openwork Client Portal. The portal will allow us to efficiently exchange information in a secure environment and approve documents as and when required.

Please click the link below to activate your client portal

[Openwork Client Portal](#) 

You must ensure that you use this email address for your portal access. If you wish to use a different email address, please let me know.

If you have any questions or problems accessing your Openwork Client Portal, please contact us.

Shaily Goyal-Test
Patel Corporation
0834 243 2432
patecorp@email.com

Authorised and regulated by the Financial Conduct Authority. If you wish to view the Openwork email disclaimer, please click [here](#).

Subject: Openwork Client Portal Invite CRM:0159902

Dear Mr Client,

As discussed, you can now access our details on your Openwork Client Portal. The portal will allow us to efficiently exchange information in a secure environment and approve documents as and when required.

Please log in to your Openwork Client Portal via the link below and select our details from the "Advisers" page once you are logged in.

[Openwork Client Portal](#) 

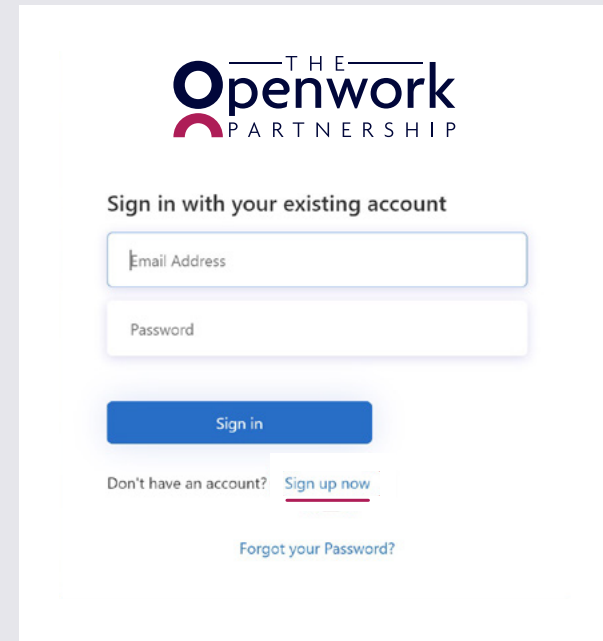
If you can't remember your login details, please follow the instructions on the website to reset your password. If you have any questions or problems accessing any information in your Openwork Client Portal, please contact us.

Shaily Goyal-Test
Patel Corporation
0834 243 2432
patecorp@email.com

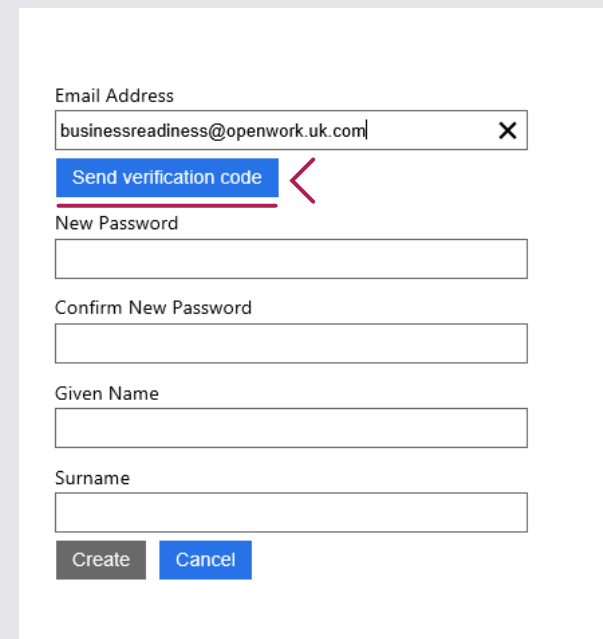
Authorised and regulated by the Financial Conduct Authority. If you wish to view the Openwork email disclaimer, please click [here](#).

How to register, create and validate an account

1. To register, click on **'Sign up now'**.
2. Enter your email address and click on **'Send verification code'**.



The screenshot shows the Openwork Partnership sign-in page. At the top is the logo with 'THE Openwork PARTNERSHIP'. Below it is the heading 'Sign in with your existing account'. There are two input fields: 'Email Address' and 'Password'. A blue 'Sign in' button is positioned below the fields. At the bottom, there is a link 'Don't have an account? [Sign up now](#)' and a link 'Forgot your Password?'.

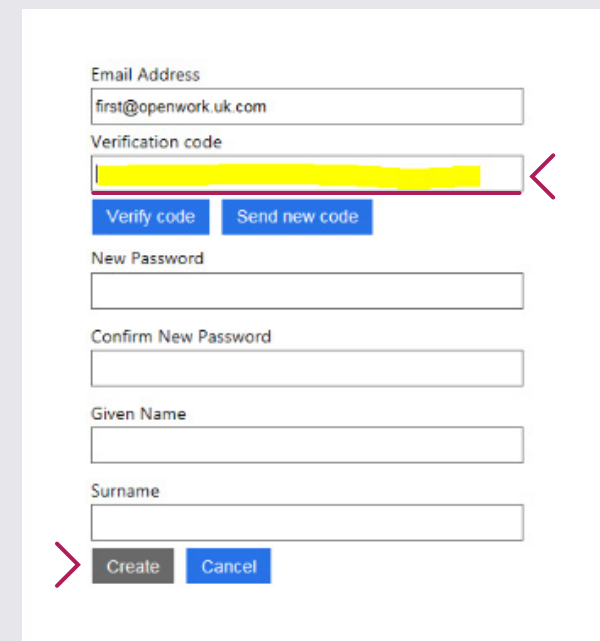
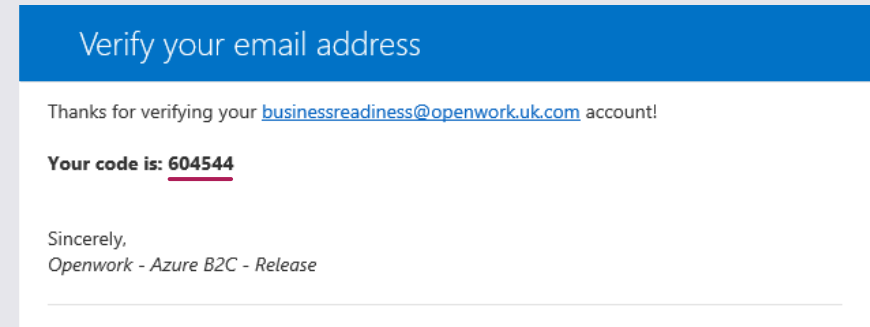


The screenshot shows the registration page. It features several input fields: 'Email Address' (containing 'businessreadiness@openwork.uk.com'), 'New Password', 'Confirm New Password', 'Given Name', and 'Surname'. A blue 'Send verification code' button is located below the email field, with a red arrow pointing to it. At the bottom, there are two buttons: 'Create' (grey) and 'Cancel' (blue).

How to register, create and validate an account

3. You will then receive a 6-digit verification code sent to your email address.
4. Enter the 6-digit code in the verification code box on the portal, then click **'Verify code'**. The verification box will then disappear, and you will need to create a password which conforms to the following format;
The password must be between 8 and 64 characters.
The password must have at least 3 of the following:
 - a lowercase letter
 - an uppercase letter
 - a digit
 - a symbol

Once you have entered and confirmed your new password, complete your name fields then click **'Create'**.



Email Address

Verification code
 <

New Password

Confirm New Password

Given Name

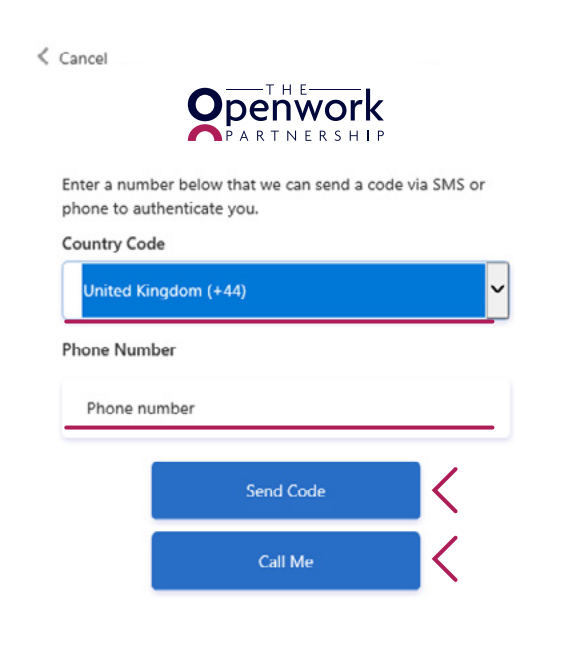
Surname

>

How to register, create and validate an account

- Once you have created your account, you will need to complete further details to receive a verification code to a mobile number. Select your Country Code from the drop-down menu and enter your preferred mobile number.
- If you click **'Send Code'** you will receive a text message from SMSVerify with a 6-digit code. Enter the code in the free box in the new window which has opened, then click 'Verify code'

If you select **'Call Me'**, you will receive a call from +1 (855) 330-8653 and an automated voice with an American accent. Select option (2) on your handset and press pound key (which is the # key) – the voice will confirm that your sign-in was successfully verified, the call ends and you will be redirected to the main sign-in page for email and password.



< Cancel

Openwork
PARTNERSHIP

Enter a number below that we can send a code via SMS or phone to authenticate you.

Country Code

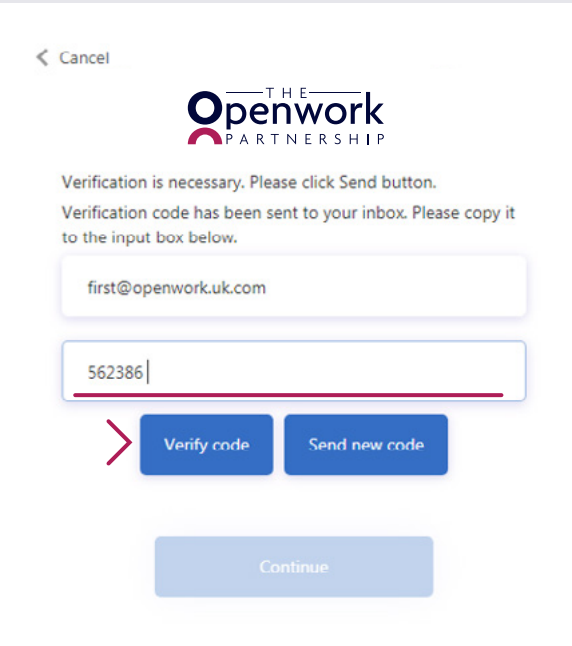
United Kingdom (+44)

Phone Number

Phone number

Send Code <

Call Me <



< Cancel

Openwork
PARTNERSHIP

Verification is necessary. Please click Send button.
Verification code has been sent to your inbox. Please copy it to the input box below.

first@openwork.uk.com

562386

> Verify code Send new code

Continue

How to register, create and validate an account

7. When you select 'Sign-in' for the first time you may see a pop-up message asking you to accept or reject cookies. Please click **'Accept'** to proceed.
8. You will then successfully be logged in to the Client Portal where you will be presented with the home page and you will see all the Advisers with whom you have a connection.

Openwork uses necessary cookies to run our website and improve its usability.

We may also place analytical cookies to collect information on how you use our website.

We need your consent to set these cookies on your device. To learn more, please read our [Cookie Policy](#).



Accept

Reject

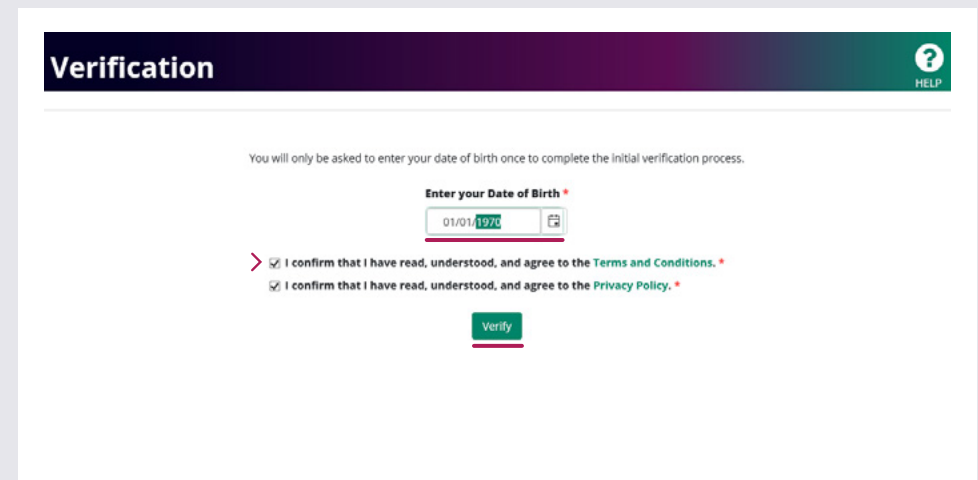
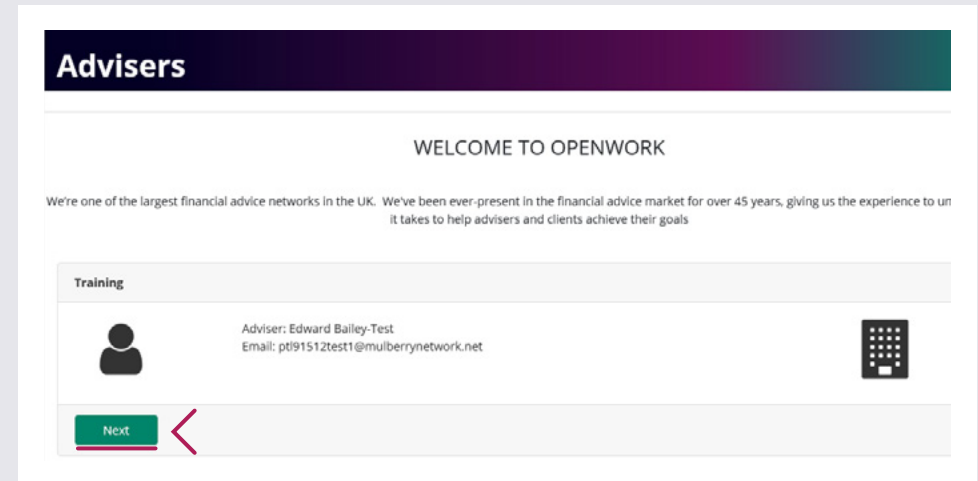
How to navigate portal content

Other steps

- [Introduction >](#)
- [How to register, create and validate an account >](#)
- [How to update your details in the Client Portal >](#)
- [How to view and upload documents >](#)
- [How to approve documents >](#)
- [How to complete the Attitude to Risk questionnaire >](#)
- [How to sign into the portal once you've registered an account >](#)
- [What to do if you forget your password >](#)

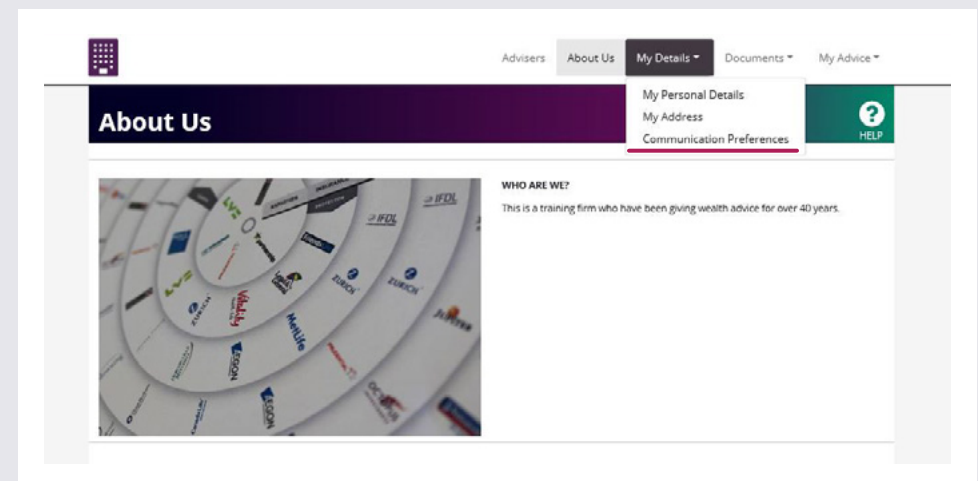
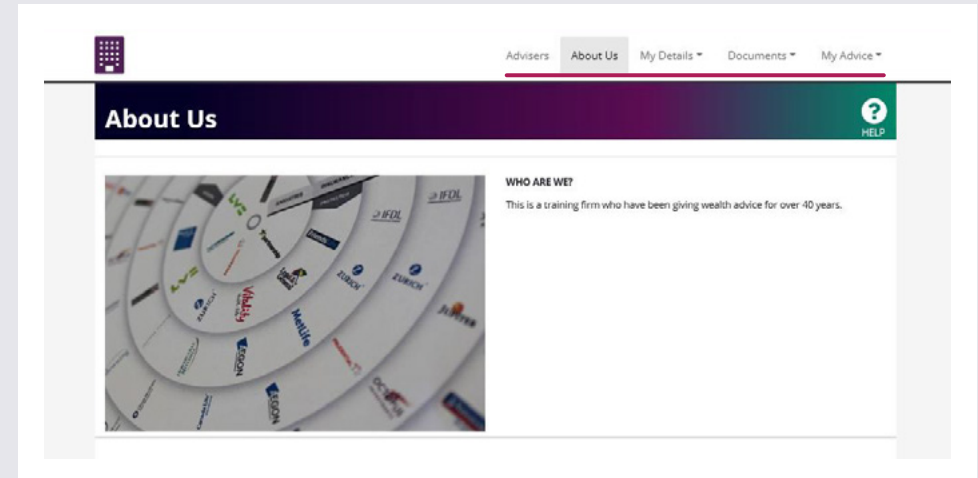
How to navigate portal content

1. Once you have logged onto the portal you will see the following screen. Click on **'Next'** underneath the Adviser that you wish to view.
2. The first time that you carry out this procedure you will be asked to verify your identity by entering your date of birth. You will also need to tick the boxes to say that you have read the Terms and Conditions and Privacy Policy. Once you have done this click **'Verify'**.



How to navigate portal content

3. You will now be directed to your 'About Us' portal page where you will be able to select further pages to enable you to perform certain functions such as approve documents, complete questionnaires, and amend your personal details etc.
4. Clicking '**Advisers**' will take you back to the first page where you can choose your Adviser see step 8 above.
Clicking '**About Us**' will reload the page that you are currently on.
Clicking '**My Details**' will open a menu where you can choose to update your 'Personal Details', 'Address Details' and 'Communication Preferences'.



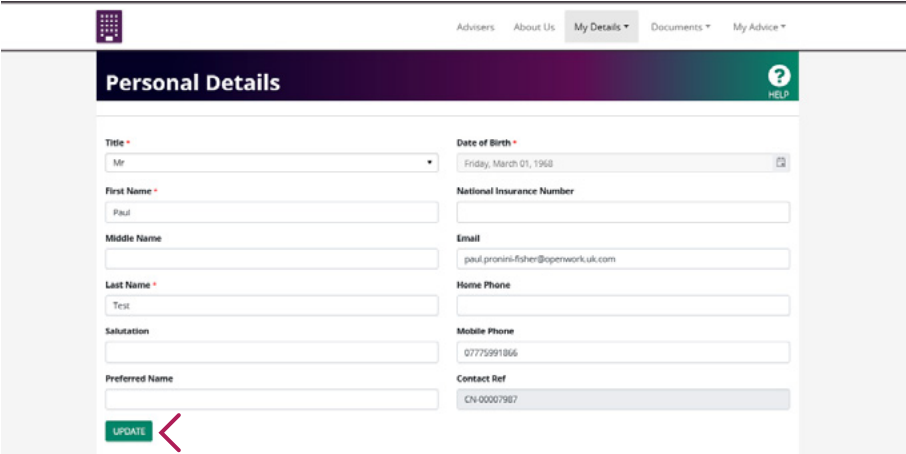
How to update your details in the Client Portal

Other steps

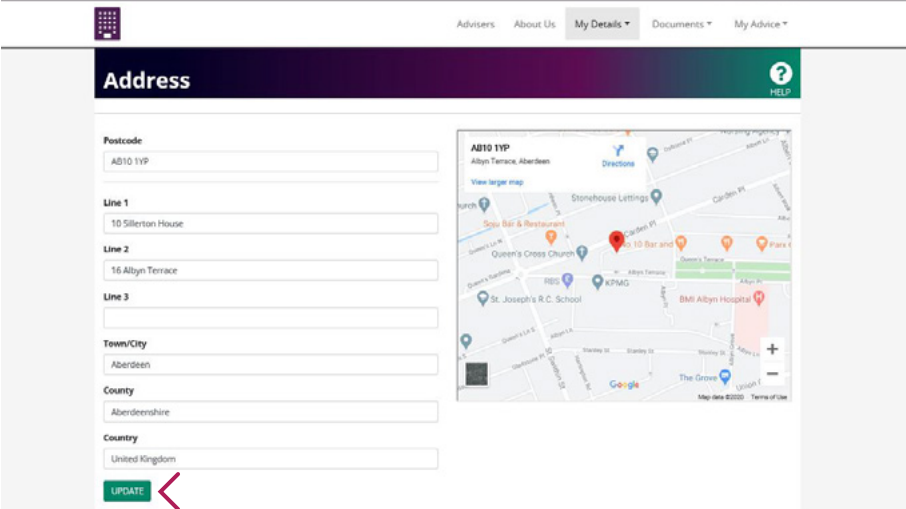
- [Introduction](#) >
- [How to register, create and validate an account](#) >
- [How to navigate portal content](#) >
- [How to view and upload documents](#) >
- [How to approve documents](#) >
- [How to complete the Attitude to Risk questionnaire](#) >
- [How to sign into the portal once you've registered an account](#) >
- [What to do if you forget your password](#) >

How to update your details in the Client Portal

1. Use the **'Personal Details'** page to update any changes to your name, telephone and email address details. Once details have been entered you will need to click **'UPDATE'** to effect the changes. Your changes will be updated immediately, and your Adviser will be notified.
2. Use the **'Address'** page to update any changes to your address. As before, once details have been entered you will need to click **'UPDATE'** to effect the changes. Your changes will be updated immediately, and your Adviser will be notified.



The screenshot shows the 'Personal Details' page in the Client Portal. The page has a dark purple header with the title 'Personal Details' and a 'HELP' icon. Below the header, there are several form fields for personal information. On the left side, there are fields for 'Title' (dropdown menu with 'Mr' selected), 'First Name' (text input with 'Paul'), 'Middle Name' (text input), 'Last Name' (text input with 'Text'), 'Salutation' (text input), and 'Preferred Name' (text input). On the right side, there are fields for 'Date of Birth' (calendar icon with 'Friday, March 01, 1968'), 'National Insurance Number' (text input), 'Email' (text input with 'paul.pronini.fisher@openwork.uk.com'), 'Home Phone' (text input), 'Mobile Phone' (text input with '07775991866'), and 'Contact Ref' (text input with 'CN-00007987'). At the bottom left, there is a green 'UPDATE' button with a left-pointing arrow.



The screenshot shows the 'Address' page in the Client Portal. The page has a dark purple header with the title 'Address' and a 'HELP' icon. Below the header, there are several form fields for address information. On the left side, there are fields for 'Postcode' (text input with 'AB10 1YP'), 'Line 1' (text input with '10 Silberton House'), 'Line 2' (text input with '16 Albyn Terrace'), 'Line 3' (text input), 'Town/City' (text input with 'Aberdeen'), 'County' (text input with 'Aberdeenshire'), and 'Country' (text input with 'United Kingdom'). On the right side, there is a map showing the location of 'AB10 1YP' in Aberdeen, Scotland. The map includes various landmarks and a 'Directions' button. At the bottom left, there is a green 'UPDATE' button with a left-pointing arrow.

How to update your details in the Client Portal

- Use the **'Communication Preferences'** page to update any changes to how you are contacted and what marketing you are happy to receive. As before, once details have been entered you will need to click **'UPDATE'** to effect the changes. Your changes will be updated immediately, and your Adviser will be notified.

The screenshot shows the 'Communication Preferences' page in a client portal. The page has a dark purple header with the title 'Communication Preferences' and a 'HELP' icon. Below the header, there are two main sections: 'COMMUNICATION PREFERENCES' and 'MARKETING PREFERENCES'. Each section contains several dropdown menus for selecting preferences. At the bottom left, there is a green 'UPDATE' button with a left-pointing arrow.

COMMUNICATION PREFERENCES	MARKETING PREFERENCES
Contact Method * Any	Marketing Emails Do Not Allow
Correspondence Email Allow	Phone Calls Do Not Allow
Servicing Emails Allow	Post Do Not Allow
Phone Do Not Allow	SMS Do Not Allow
Post Do Not Allow	
SMS Do Not Allow	

How to view and upload documents

Other steps

- [Introduction >](#)
- [How to register, create and validate an account >](#)
- [How to navigate portal content >](#)
- [How to update your details in the Client Portal >](#)
- [How to approve documents >](#)
- [How to complete the Attitude to Risk questionnaire >](#)
- [How to sign into the portal once you've registered an account >](#)
- [What to do if you forget your password >](#)

How to view and upload documents

1. Clicking on **'Documents'** will open a menu where you can choose to view documents that you have uploaded, those which need your approval, all documents loaded to your portal plus documents within your **'Document Library'**.
2. **'My Uploads'** lists out the documents that you have shared with your Adviser via the portal. This is also where you can upload any new documents. To upload a new document, click **'Add'**.

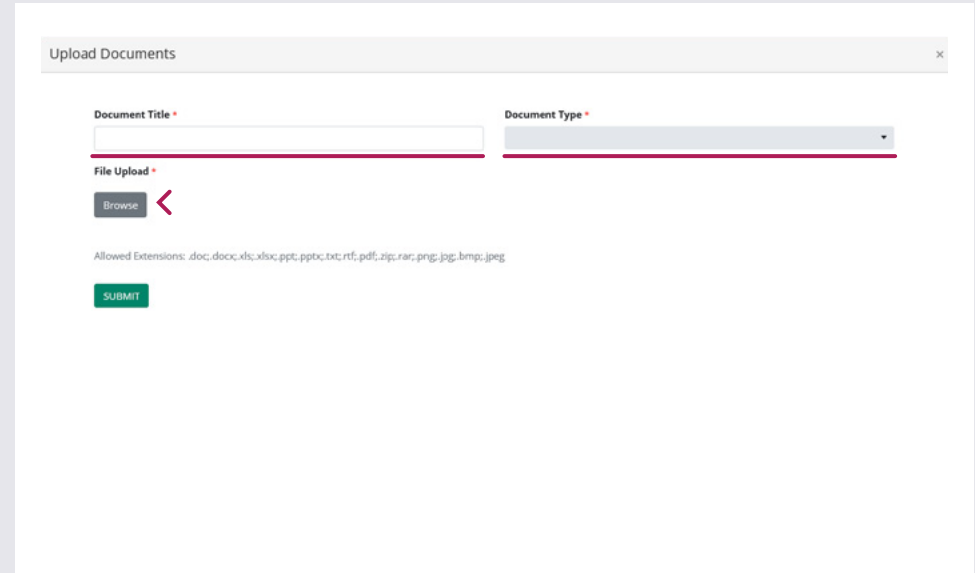
The screenshot shows the 'About Us' page of a web portal. The navigation bar at the top includes 'Advisers', 'About Us', 'My Details', 'Documents', and 'My Advice'. The 'Documents' menu is open, showing options for 'My Uploads', 'Approval Required', 'All Documents', and 'Document Library'. A 'HELP' button is visible in the top right corner. The main content area features a circular graphic with various logos, a 'WHO ARE WE?' section, and contact information for Openwork Ltd.

The screenshot shows the 'My Uploads' page of a web portal. The navigation bar at the top includes 'Advisers', 'About Us', 'My Details', 'Documents', and 'My Advice'. The 'Documents' menu is open, showing options for 'My Uploads', 'Approval Required', 'All Documents', and 'Document Library'. A 'HELP' button is visible in the top right corner. The main content area features an 'Add' button and a table with columns for Document Title, Uploaded By, Document Type, and Created On.

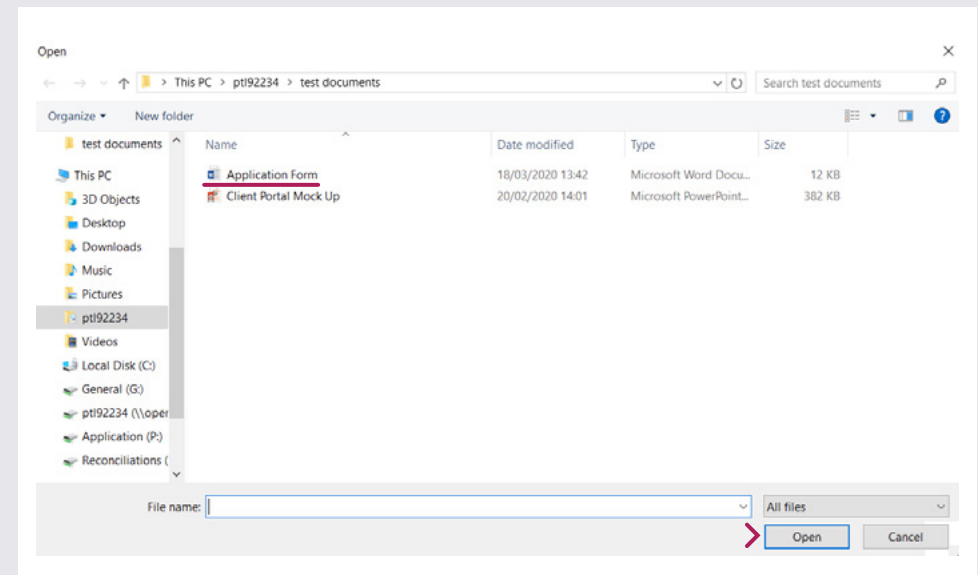
Document Title	Uploaded By	Document Type	Created On
No Data Available			

How to view and upload documents

3. Enter the name of the document in the **'Document Title'**, select the **'Document Type'** from the drop-down options, then click **'Browse'** to select the document from your computer.
4. When diverted to your computer files select the document that you want to upload and click **'Open'**.



The screenshot shows a web form titled "Upload Documents". It contains two input fields: "Document Title" and "Document Type". Below these is a "File Upload" section with a "Browse" button and a left-pointing arrow. At the bottom, there is a "SUBMIT" button. A note specifies "Allowed Extensions: .doc;.docx;.xls;.xlsx;.ppt;.pptx;.txt;.rtf;.pdf;.zip;.rar;.png;.jpg;.bmp;.jpeg".



How to view and upload documents

5. Make sure that the correct document name is showing next to **'Browse'** and if this is correct, click **'Submit'**.
6. The document will now be added to the portal and available on the **'My Uploads'** page.

Upload Documents

Document Title

Document Type

File Upload Application Form.docx

Allowed Extensions: .doc, .docx, .xls, .xlsx, .ppt, .pptx, .txt, .rtf, .pdf, .zip, .rar, .png, .jpg, .bmp, .jpeg

Advisers About Us My Details Documents My Advice

My Uploads

HELP

	Document Title	Uploaded By	Document Type	Created On
<input checked="" type="checkbox"/>	Application	Client	Application Form & Declaration	18/03/2020 3:05 PM

How to approve documents

Other steps

- [Introduction](#) >
- [How to register, create and validate an account](#) >
- [How to navigate portal content](#) >
- [How to update your details in the Client Portal](#) >
- [How to view and upload documents](#) >
- [How to complete the Attitude to Risk questionnaire](#) >
- [How to sign into the portal once you've registered an account](#) >
- [What to do if you forget your password](#) >

How to approve documents

1. On the **'Approvals Required'** page you will find any documents that your Adviser needs you to approve. To approve a document, click on the tick box to the left of the document.
2. Choose **'Yes'** from the drop-down menu under **'Approved?'** and click **'Submit'**.

Advisers About Us My Details Documents My Advice

Approval Required HELP

Document Title	Document Type	Document Purpose	Approval Required?	Approved?
<input type="checkbox"/> Privacy Notice (for approval)	Privacy Notice	Disclosure	Yes	No

Document Approval

Approved?

No

No

Yes

Privacy Notice

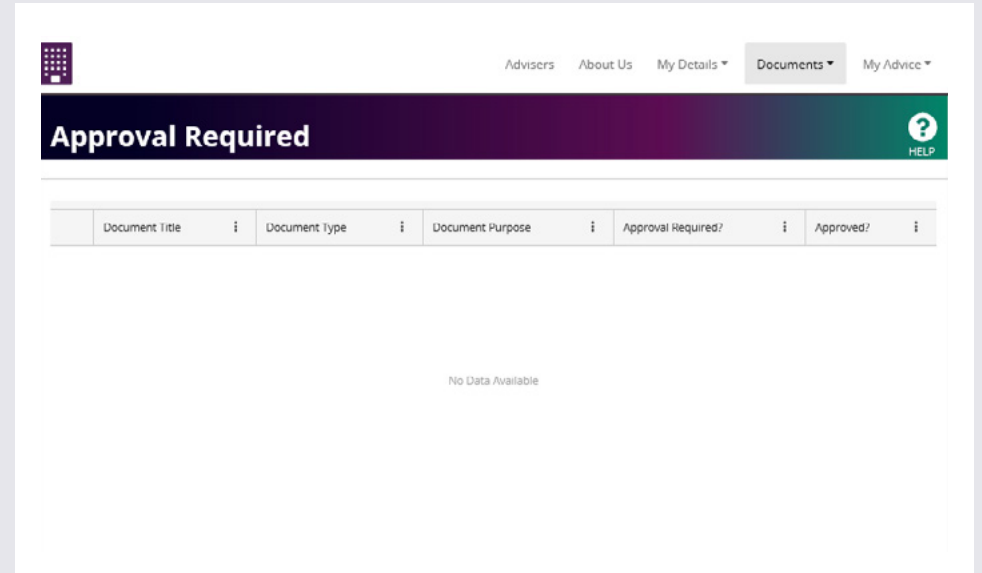
Please review and approve this Privacy Notice

[Download Firm Brochure.pdf](#)

Document cannot be previewed

How to approve documents

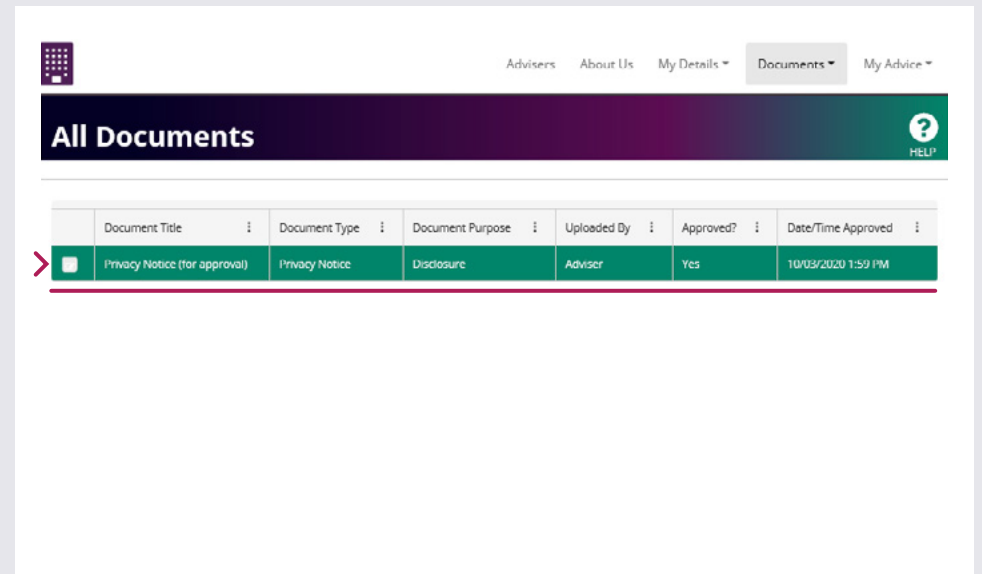
3. The document will then disappear from the list.
4. The document will now appear in the list of **'All Documents'**, each document can be viewed by checking the tick box to the left.



Advisers About Us My Details Documents My Advice

Approval Required

Document Title	Document Type	Document Purpose	Approval Required?	Approved?
No Data Available				



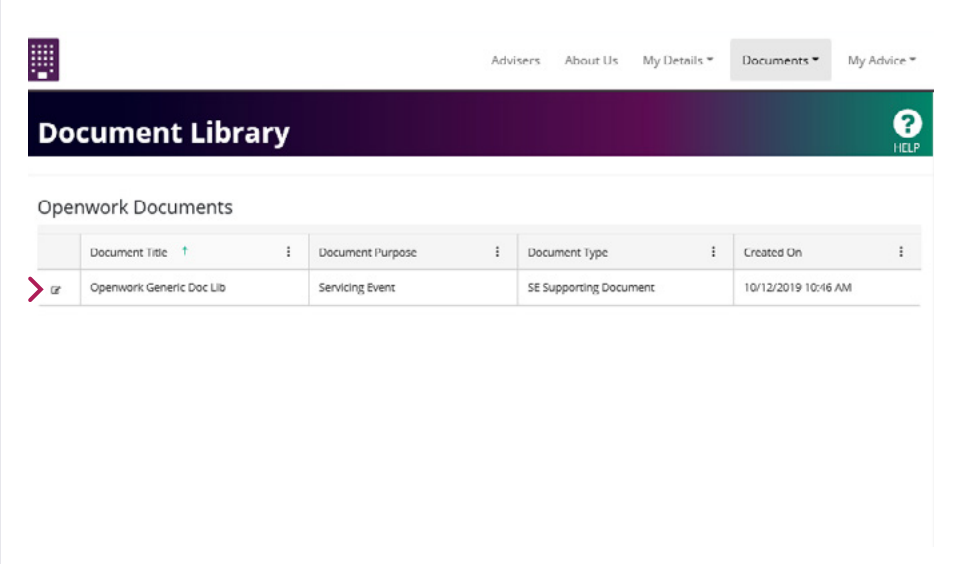
Advisers About Us My Details Documents My Advice

All Documents

Document Title	Document Type	Document Purpose	Uploaded By	Approved?	Date/Time Approved
<input checked="" type="checkbox"/> Privacy Notice (for approval)	Privacy Notice	Disclosure	Adviser	Yes	10/03/2020 1:59 PM

How to approve documents

5. **‘Document Library’** displays a list of all the documents which have been shared by your Adviser on the portal. To view any of the documents click the tick box adjacent to it.



The screenshot displays the 'Document Library' section of a web portal. At the top, there is a navigation bar with links for 'Advisers', 'About Us', 'My Details', 'Documents', and 'My Advice'. Below this is a dark purple header with the text 'Document Library' and a 'HELP' button. The main content area is titled 'Openwork Documents' and contains a table with the following data:

	Document Title ↑	Document Purpose	Document Type	Created On
>	Openwork Generic Doc Lib	Servicing Event	SE Supporting Document	10/12/2019 10:16 AM

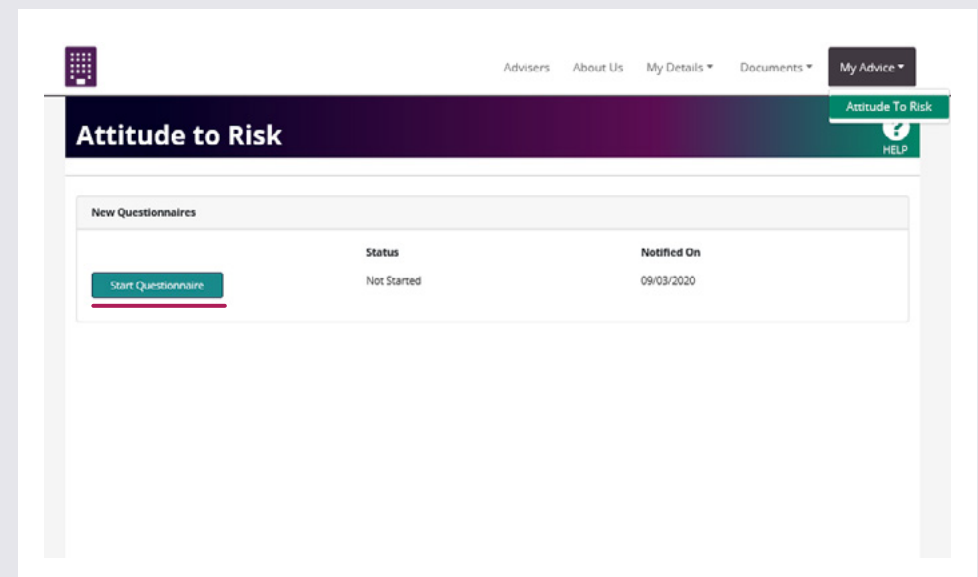
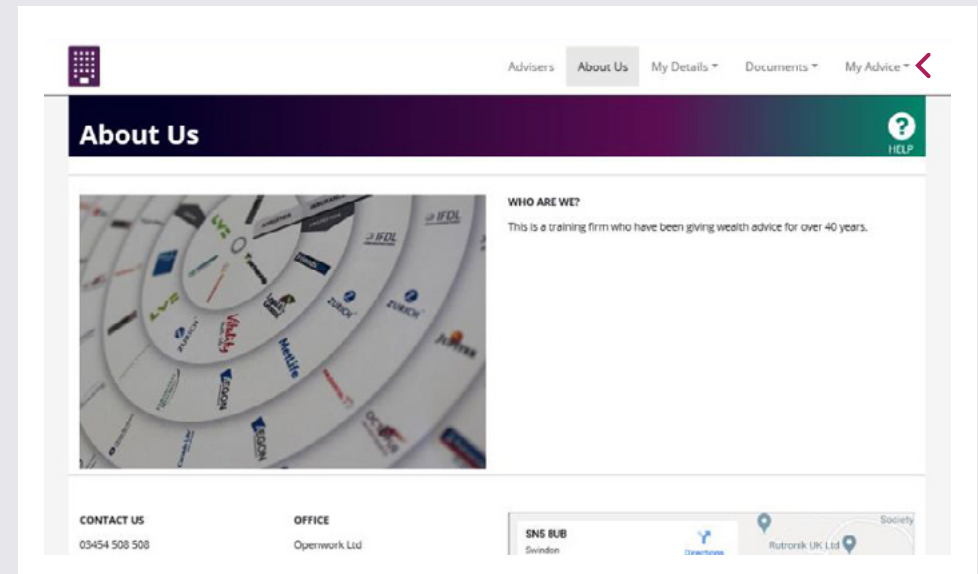
How to complete the Attitude to Risk questionnaire

Other steps

- [Introduction >](#)
- [How to register, create and validate an account >](#)
- [How to navigate portal content >](#)
- [How to update your details in the Client Portal >](#)
- [How to view and upload documents >](#)
- [How to approve documents >](#)
- [How to sign into the portal once you've registered an account >](#)
- [What to do if you forget your password >](#)

How to complete the Attitude to Risk questionnaire

1. From the **'About Us'** portal page select **'My Advice'** then **'Attitude to Risk'**
2. The **'My Advice'** tab displays advice-related tasks and documents that require completion including the **'Attitude to Risk'** questionnaire for you to complete. To complete the questionnaire click on **'Start Questionnaire'**.



How to complete the Attitude to Risk questionnaire

3. Answer the questions then submit the questionnaire, you will then receive your initial **'Attitude to Risk Results'**. Click on **'Continue Questionnaire'** to be directed to an additional five questions regarding your **'Capacity for Loss'**.

2. Answer these five questions and click **'Save and Submit'**.

Attitude to Risk Results

Thank you for completing the questionnaire. Your responses suggest an attitude to risk of **Balanced**.

There is a **41%** chance of being **Adventurous**.

There is a **34%** chance of being **Cautious**.

You are likely to require an investment that offers higher returns than those available from deposit accounts. You are also likely to accept fluctuation in the value of your investments as the markets change, based on an understanding that this will be necessary to meet your long-term goals.

As a balanced investor, you will be knowledgeable about financial matters, and show some interest in keeping up to date with them. You may have some experience of investment, including investing in products containing assets like shares and government bonds.

In general, you understand that you have to take investment risk in order to be able to meet long-term goals and you are willing to take risk with part of your investments, accepting that the value of them could rise or fall.

Balanced investors will usually be able to make up their minds on investment matters relatively quickly, but do still feel some concern when their investment decisions turn out badly.

Please refer to the "Making More of Your Money Better" which explains this in more detail. An electronic version of this document can be found in the OpenRisk Documents section of the Document Library. You will find the Document Library under the Documents tab.

Typical Asset Mix

Asset Class	Percentage
UK Equities	30%
US Equities	15%
Other Diversified	15%
Alternative Strategies	5%
UK Bonds	20%
Global Bonds	5%
Emerging Markets	10%

[Continue Questionnaire](#)

Capacity for Loss

Please answer the following 5 questions which will help your Adviser to assess your Capacity for Loss. They will discuss this with you in more detail with you.

Question 1. What level of knowledge do you have of investments and the risks associated with investing?*

- A. I have a more detailed level of knowledge of how investments work. This includes the different types of investments available and the potential risks/rewards associated with investing
- B. I have good level of knowledge of the basic types of investments including the risks involved with investing
- C. I have limited or no knowledge about investments and the risks involved with investing

Question 2. What previous experience have you had of investing, including any gains or losses on investments?*

- A. I have had significant previous experience of investing including instances where I have made gains and where I have experienced losses to capital. Losses did not tend to worry me
- B. I have some experience of investing. I may have experienced losses in the past which may have made me feel uncomfortable, but I understand the longer term nature of investing
- C. I have little or no previous experience of investing and no experience of how investment gains/losses can impact me. Making a loss would be a worry to me

Question 3. I anticipate that I will need to access significant capital and/or income from my investment(s) within the following timeframe:*

- A. More than 10 years from now
- B. Between 5 and 10 years from now
- C. Within the next 5 years

Question 4. If this investment performed badly and made a loss, what impact would it have on your financial well being or to what extent would it have a detrimental impact on your standard of living?*

- A. It would have little or no impact
- B. It would have some impact
- C. It would have a detrimental impact

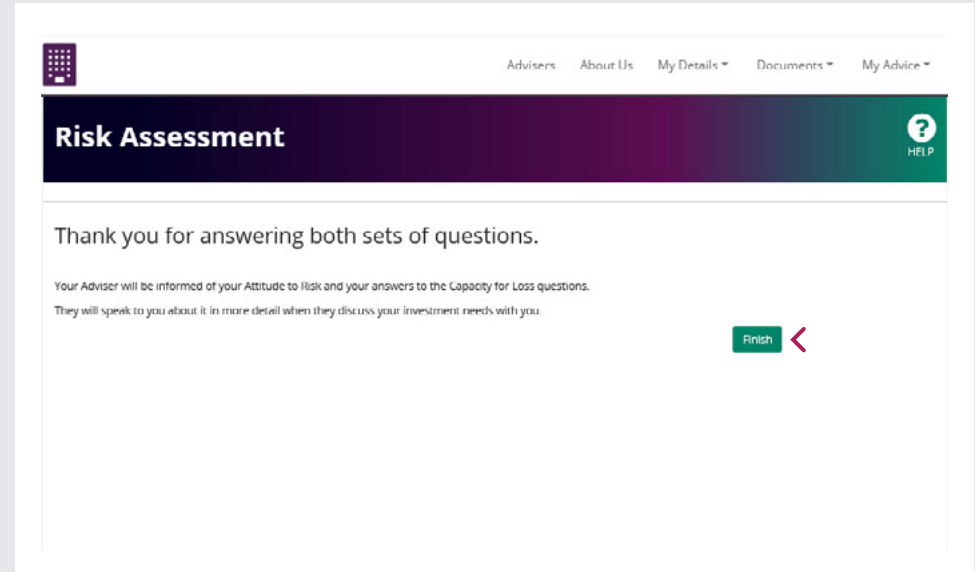
Question 5. If you encountered a financial emergency, to what extent would you need to rely on accessing funds within this or your other investments?*

- A. I would not need to access this or any other investments. I have sufficient cash-based savings which are easily accessed in the event of a financial emergency
- B. I may need to consider taking funds out of this and/or other investments in the event of a financial emergency
- C. I would almost certainly have to access this and/or other investments in the event of a financial emergency. I do not have easily accessed, cash-based savings I could fall back on

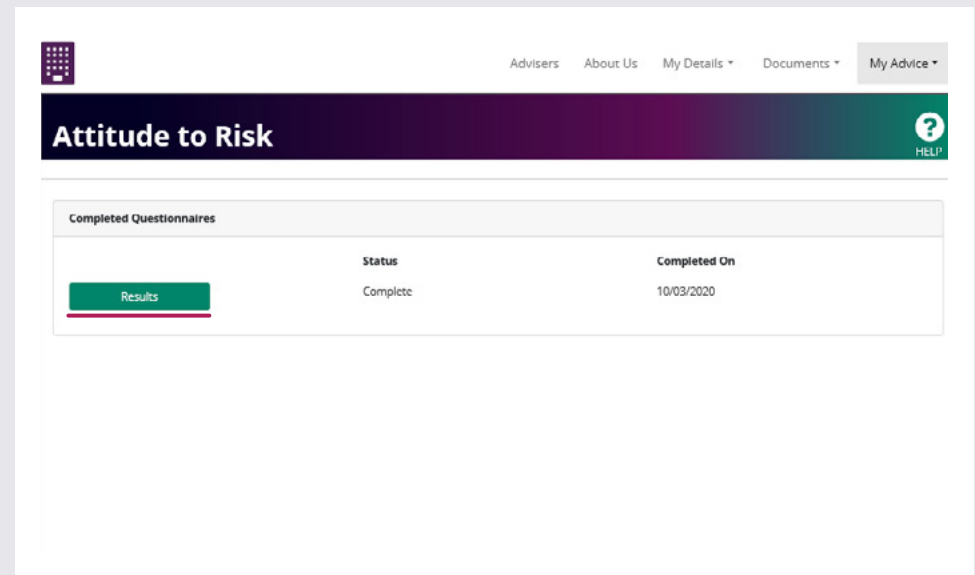
[Save and Submit](#)

How to complete the Attitude to Risk questionnaire

5. You will be directed to the following **'Risk Assessment'** page where you should click on **'Finish'**.
6. Your **'Attitude to Risk'** result is available by clicking on **'Results'**.



The screenshot shows the 'Risk Assessment' page. At the top, there is a navigation bar with links for 'Advisers', 'About Us', 'My Details', 'Documents', and 'My Advice'. The main header is dark purple with the text 'Risk Assessment' and a 'HELP' button with a question mark icon. The main content area has a white background and contains the following text: 'Thank you for answering both sets of questions.' followed by 'Your Adviser will be informed of your Attitude to Risk and your answers to the Capacity for Loss questions. They will speak to you about it in more detail when they discuss your investment needs with you.' At the bottom right of the content area, there is a green button labeled 'Finish' with a red arrow pointing left.



The screenshot shows the 'Attitude to Risk' results page. At the top, there is a navigation bar with links for 'Advisers', 'About Us', 'My Details', 'Documents', and 'My Advice'. The main header is dark purple with the text 'Attitude to Risk' and a 'HELP' button with a question mark icon. The main content area has a white background and contains a table titled 'Completed Questionnaires'. The table has three columns: 'Results', 'Status', and 'Completed On'. The first row shows 'Results' in a green box, 'Complete', and '10/03/2020'.

Results	Status	Completed On
Results	Complete	10/03/2020

How to complete the Attitude to Risk questionnaire

7. Here is your report.

Attitude to Risk Results

Thank you for completing the questionnaire. Your responses suggest an attitude to risk of: **Balanced**

There is a **<1%** chance of being **Adventurous**

There is a **34%** chance of being **Cautious**

You are likely to require an investment that offers higher returns than those available from deposit accounts. You are also likely to accept fluctuation in the value of your investments as the markets change, based on an understanding that this will be necessary to meet your long-term goals.

As a balanced investor, you will be knowledgeable about financial matters, and show some interest in keeping up to date with them. You may have some experience of investment, including investing in products containing assets like shares and government bonds.

In general, you understand that you have to take investment risk in order to be able to meet long-term goals and you are willing to take risk with part of your investments, accepting that the value of them could rise or fall.

Balanced investors will usually be able to make up their minds on investment matters relatively quickly, but do still feel some concern when their investment decisions turn out badly.

Please refer to the "Making More of Your Money Booklet" which explains this in more detail. An electronic version of this document can be found in the Openwork Documents section of the Document Library. You will find the Document Library under the Documents tab

Typical Asset Mix

Asset Class	Percentage
UK Equities	30%
US Equities	15%
Other Developed Markets Equity	15%
Alternative Strategies	5%
UK Bonds	20%
Global Bonds	5%
Emerging Markets	10%

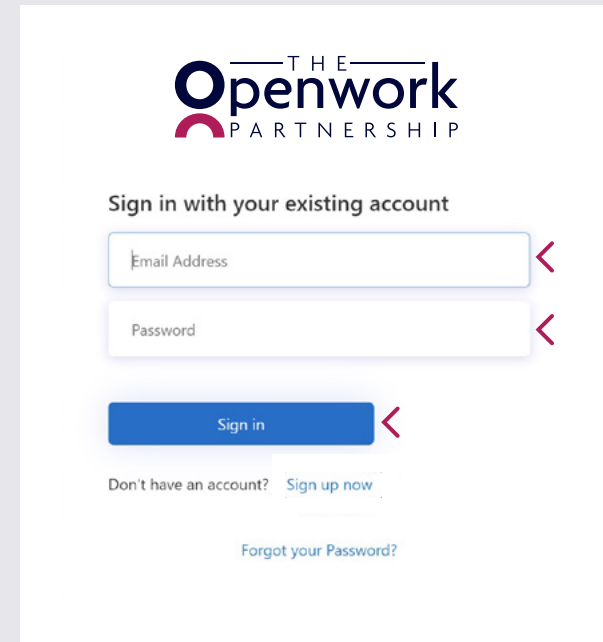
How to sign into the portal once you've registered an account

Other steps

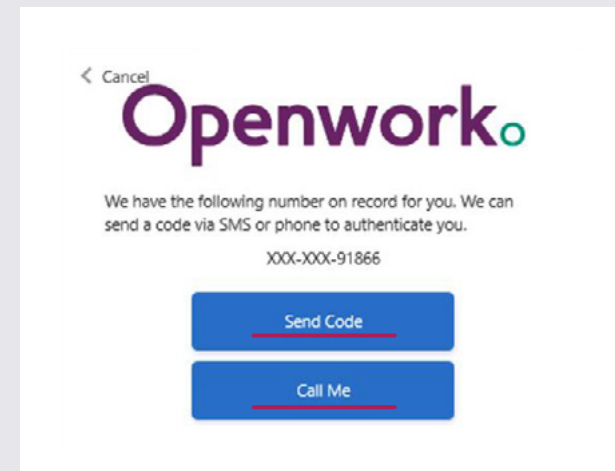
- [Introduction >](#)
- [How to register, create and validate an account >](#)
- [How to navigate portal content >](#)
- [How to update your details in the Client Portal >](#)
- [How to view and upload documents >](#)
- [How to approve documents >](#)
- [How to complete the Attitude to Risk questionnaire >](#)
- [What to do if you forget your password >](#)

How to sign into the portal once you've registered an account

1. Open the Openwork Client Portal sign-in page by clicking the link or typing it into your browser www.myadvicehub.com/ then bookmark the page / save it as a favourite.
2. Enter your email address and the password that you have already created, then click **'Sign in'**.
3. You will be redirected to the following screen where you will need to carry out a second-stage verification, either by requesting a code is sent to your mobile by clicking **'Send Code'** or by requesting a call back by clicking on **'Call Me'**.



The screenshot shows the Openwork sign-in page. At the top is the logo for 'THE Openwork PARTNERSHIP'. Below the logo is the heading 'Sign in with your existing account'. There are two input fields: 'Email Address' and 'Password', each with a red arrow pointing left. Below the fields is a blue 'Sign in' button with a red arrow pointing left. At the bottom, there is a link 'Don't have an account? Sign up now' and a link 'Forgot your Password?'.

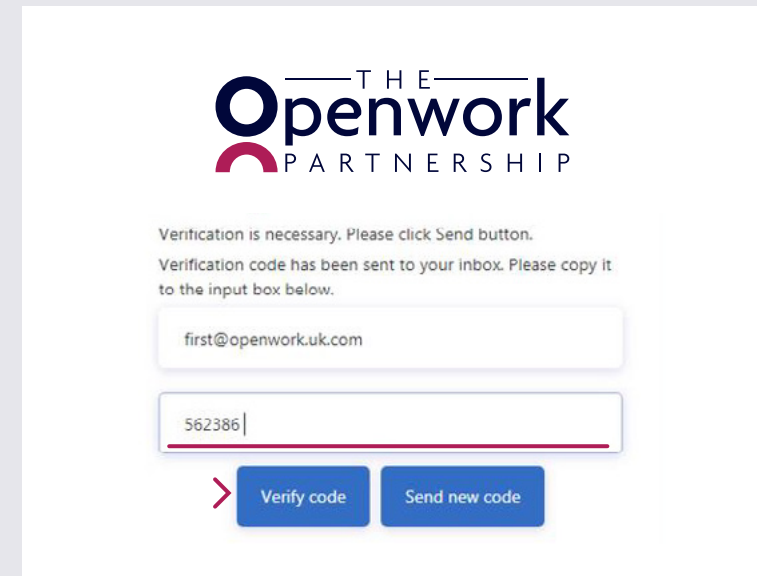


The screenshot shows the Openwork verification screen. At the top left is a 'Cancel' link with a left arrow. The logo 'Openwork' is prominently displayed. Below the logo is the text: 'We have the following number on record for you. We can send a code via SMS or phone to authenticate you.' followed by the phone number 'XXX-XXX-91866'. At the bottom are two blue buttons: 'Send Code' and 'Call Me', each with a red underline.

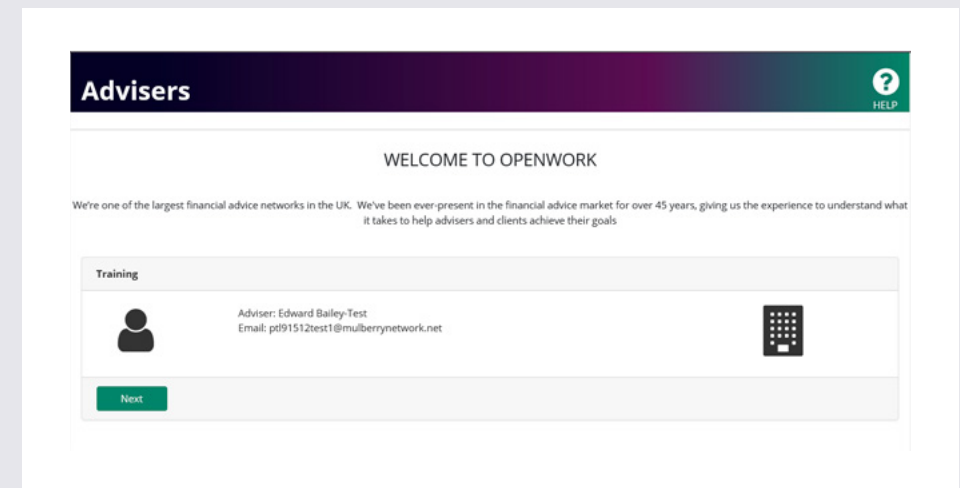
How to sign into the portal once you've registered an account

4. If you click **'Send Code'** you will receive a text message from SMSVerify with a 6-digit code. Enter the code in the free box in the new window which has opened, then click **'Verify code'**.

If you select **'Call Me'**, you will receive a call from +1 (855) 330-8653 and an automated voice with an American accent asking you to press the pound key (which is the # key). Do this and you will be told your sign-in was successfully verified, the call ends and you will be redirected to the Welcome page of the portal.



The screenshot shows the Openwork Partnership verification interface. At the top is the logo with the text "THE Openwork PARTNERSHIP". Below the logo, there is a message: "Verification is necessary. Please click Send button. Verification code has been sent to your inbox. Please copy it to the input box below." There are two input fields: the first contains the email address "first@openwork.uk.com" and the second contains the verification code "562386". Below the input fields are two blue buttons: "Verify code" and "Send new code".



The screenshot shows the "Advisers" section of the Openwork portal. The header is dark green with the word "Advisers" in white and a "HELP" icon. Below the header, it says "WELCOME TO OPENWORK" and "We're one of the largest financial advice networks in the UK. We've been ever-present in the financial advice market for over 45 years, giving us the experience to understand what it takes to help advisers and clients achieve their goals". There is a "Training" section with a profile card for "Adviser: Edward Bailey-Test" with email "pt91512test1@mulberrynetwork.net". A "Next" button is visible at the bottom of the card.

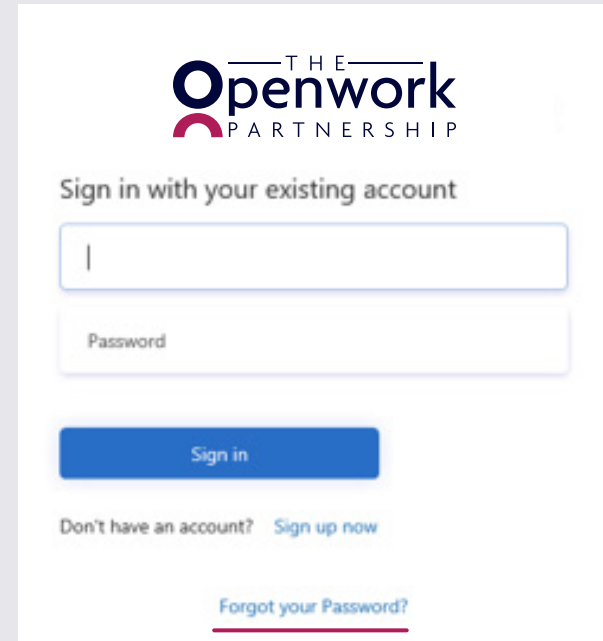
What to do if you forget your password

Other steps

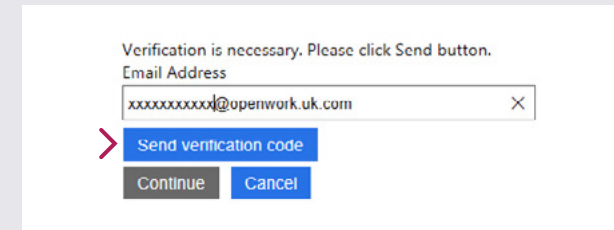
- [Introduction](#) >
- [How to register, create and validate an account](#) >
- [How to navigate portal content](#) >
- [How to update your details in the Client Portal](#) >
- [How to view and upload documents](#) >
- [How to approve documents](#) >
- [How to complete the Attitude to Risk questionnaire](#) >
- [How to sign into the portal once you've registered an account](#) >

What to do if you forget your password

1. Select **'forgotten your password'**.
2. Fill in the email address which you registered with at the start and click **'send verification code'**.
3. You will receive an email with the code.



The Openwork Partnership logo is at the top. Below it, the text "Sign in with your existing account" is displayed. There are two input fields: the first is empty, and the second is labeled "Password". A blue "Sign in" button is below the fields. At the bottom, there is a link "Don't have an account? Sign up now" and a link "Forgot your Password?" which is underlined.



The screen displays the message "Verification is necessary. Please click Send button." Below this is an "Email Address" field containing "xxxxxxxxx@openwork.uk.com" with a clear button (X). To the left of the field is a red arrow pointing right. Below the field are three buttons: "Send verification code" (blue), "Continue" (grey), and "Cancel" (blue).



The screen has a blue header bar with the text "Verify your email address". Below the header, it says "Thanks for verifying your businessreadiness@openwork.uk.com account!". Below that, it says "Your code is: 797444". At the bottom, it says "Sincerely, Openwork - Azure B2C - Release".

What to do if you forget your password

4. Enter the verification code that was sent to your email address and click verify code. If the code has expired, you will need to click **'Send new code'**.
5. Once you have entered the verification key it will ask if you want to change your email address on the account or continue to proceed to changing the password.

Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address
businessreadiness@openwork.uk.com

Verification code
797444

Verify code Send new code

Continue Cancel

E mail address verified. You can now continue.

Email Address
businessreadiness@openwork.uk.com

Change e-mail

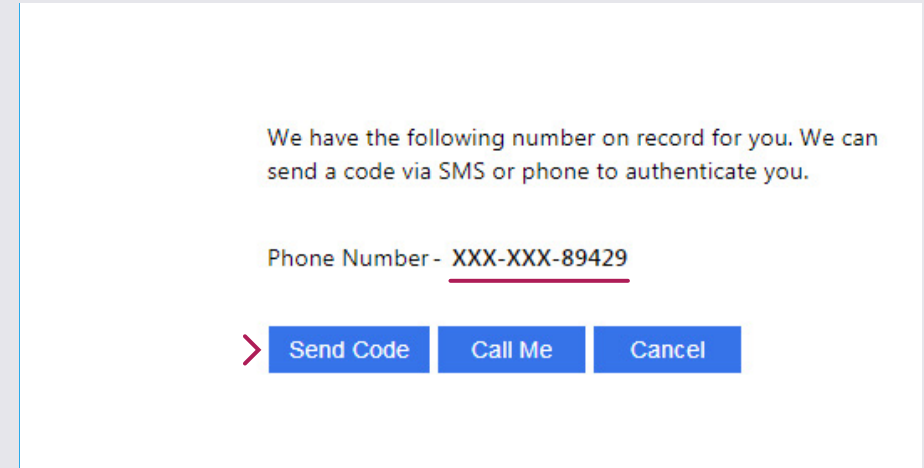
Continue Cancel

What to do if you forget your password

6. You will then be sent a verification code to your preferred contact number.

Ensure your preferred mobile number is shown and click **'Send Code'**, you will then receive a text message with a 6-digit code, from SMSVerify. If you select **'Call me'**, you'll receive a call from +1 (855) 330-8653 (2) You will then have to press the pound key (which is the #) – You will then be told your sign-in was successfully verified and the call will end.

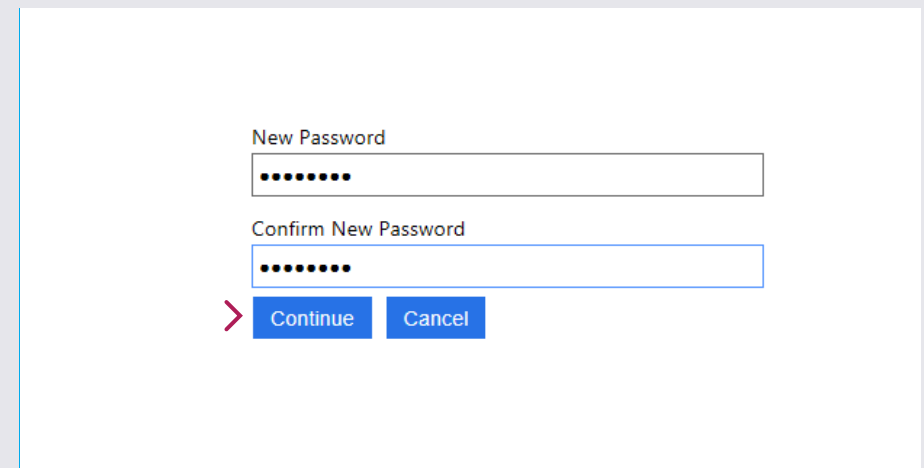
7. It will then ask you to input the new password and then confirm the new password again, once you have done so click continue.



We have the following number on record for you. We can send a code via SMS or phone to authenticate you.

Phone Number - XXX-XXX-89429

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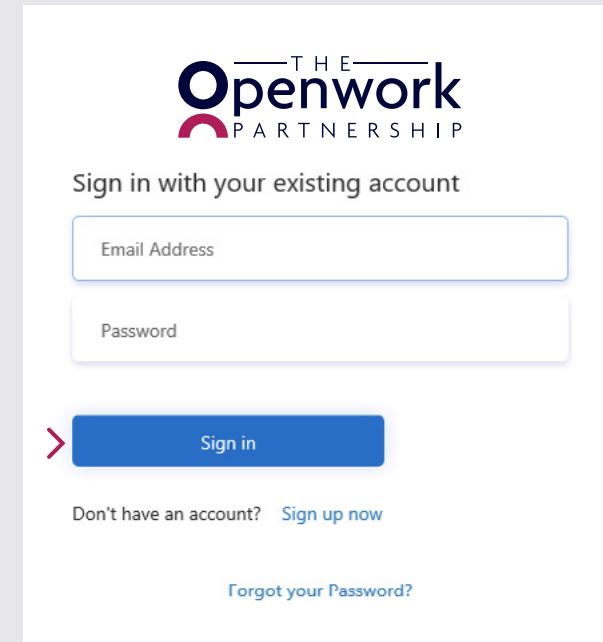
New Password
.....

Confirm New Password
.....

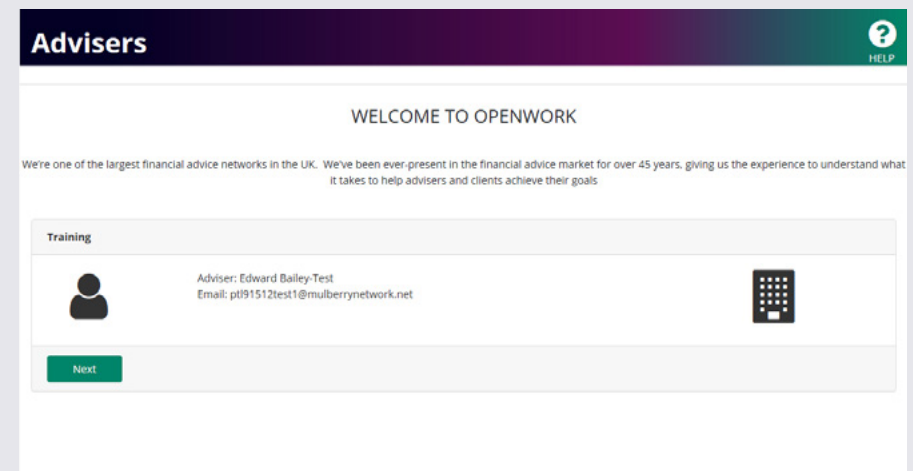
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What to do if you forget your password

8. Once you've pressed continue you will be redirected to the sign-in screen where you will use the email address you registered with and the NEW password.
9. You will then be successfully logged in.



The image shows a sign-in screen for 'THE Openwork PARTNERSHIP'. At the top is the logo with 'THE' in small letters above 'Openwork' and 'PARTNERSHIP' below it. Below the logo is the text 'Sign in with your existing account'. There are two input fields: 'Email Address' and 'Password'. Below these is a blue 'Sign in' button with a red chevron icon to its left. Underneath the button are two links: 'Don't have an account? Sign up now' and 'Forgot your Password?'.



The image shows a dashboard for 'Advisers'. The header is dark green with the word 'Advisers' in white and a 'HELP' icon in the top right. Below the header is a white section with the text 'WELCOME TO OPENWORK' and a paragraph: 'We're one of the largest financial advice networks in the UK. We've been ever-present in the financial advice market for over 45 years, giving us the experience to understand what it takes to help advisers and clients achieve their goals'. Below this is a 'Training' section with a user profile card for 'Adviser: Edward Bailey-Test' with email 'pt91512test1@mulberrynetwork.net'. The card includes a person icon, a calendar icon, and a 'Next' button.