EQUILIBRIUM

Client portal

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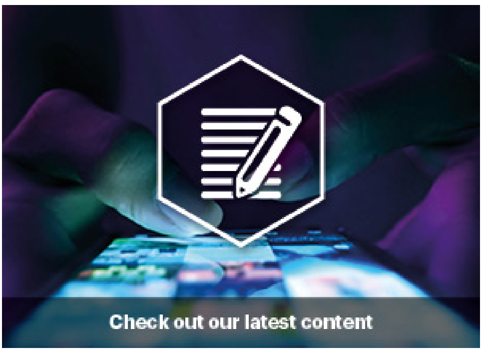
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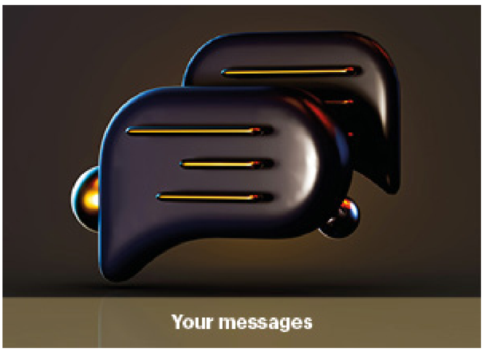
Your messages

Set up your portal today

The Equilibrium client portal is our preferred and secure way to message and share documents such as reviews, meeting summaries, and reports.

If you would like to sign up to the Equilibrium client portal, please let your client manager know, and simply follow the steps below.

1 Download the app or visit the website

App: Simply scan the QR code on this flyer with your Apple or Android phone to download the Equilibrium client portal app.

Website: Visit **portal.equilibrium.co.uk**.

2 Logging in

Your client manager will set up your access to the portal.

You'll receive two emails from portal@equilibrium.co.uk with your login details: one with your username (which is your email address), and one with an auto-generated password.

Use these to log in for the first time.

3 Create your own password

Once logged in, you'll be prompted to set a new password and a memorable word for added security.

4 Access the portal

You're good to go! You can now access the Equilibrium client portal to track your finances, view your asset overview, access the latest content and investment news, and message us securely—all in one place, anytime.

If you need help at any point, your client manager is just a message or call away. They'll be happy to help guide you through the setup process.

Download the app

Apple devices

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Android devices

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