



Get started on the M&G Wealth Platform

STAGE 1 – Registering for and accessing the secure email portal

We use the Cisco Secure Email Encryption Service (CSEES) which is a secure email portal to send sensitive information to you. For example, your platform login and password which you'll need to access the platform

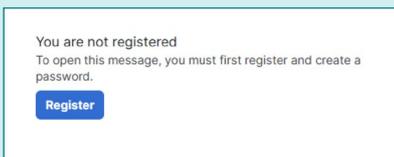
The email portal is managed by M&G plc, who own the M&G Wealth Platform.

You'll receive an M&G plc branded email like the one shown here – just follow the steps below to register.



Step 1

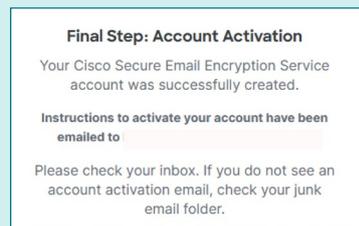
When you receive the secure email shown above, click the 'Read email' button. You will be taken to the browser see the message below, prompting you to click the 'Register' button. The button will take you to a form to add your registration details.



Step 2

Complete the form including setting a password. You'll also need to accept the Terms Of Service by ticking the box. Then click 'Register'.

You'll now see this message, prompting you to activate your account.



Please note: Passwords must be a minimum of 8 characters or numbers, are case-sensitive and must contain both letters and numbers

Step 3

The activation email will have the subject line 'Please activate with CRES'.

Open the message and click the Activate Account button to complete the registration process.



Once you've completed your portal registration, you'll receive an email with details of how to register for the platform. On the next page we show you how to get set up.

STAGE 2 – Accessing the platform

Access our platform in these 3 easy steps.



Receive your activation emails

You'll receive two separate emails from noreply@mandg.com which will contain:

- Email 1: our Client Number. This will be your platform username
- Email 2: A unique activation code and link to activate your online access. Follow the link to login to the platform



Enter your login details

When you arrive at the platform login page, enter your username (this is your Client Number) and unique activation code. Click 'Next'.

You'll be asked to confirm that the email address you provided as part of the application process is correct and given the option to change it if you wish.



Set your password

Enter your chosen password and confirm it again. Passwords need to be a minimum of 8 characters and need to include at least 3 criteria: 1 uppercase character, 1 lowercase character, 1 number or 1 special character (e.g. !, & %).

Click 'Submit' and you'll arrive at our login screen. Enter your login details and you'll now have access to the platform.



Once you log in, you'll be taken to the platform homepage.

Here you'll find an overview of your portfolio and investments, and some important correspondence.

We've also created this [useful guide](#) on how to use the platform once you've completed your registration, including resetting your password if you forget it.

Your adviser can take you through how to access the various documents.

If you've forgotten your username or password to access the platform just go to the platform login page and follow the prompts to reset your login details.

If you have any difficulties getting started on the platform please call us on 0345 076 6140. Our lines are open between 8.30am and 5.30pm, Monday to Friday.

