



# Getting the most from Your EQ Portal



Simply keep track of all  
your assets online

# Introducing your EQ Portal

The EQ Portal offers a clear view of all your assets online. It shows how your investments have performed, provides a full transaction history and allows you to see assets that we manage alongside other assets that you own.

You can access the portal via your browser on mobile, tablet or desktop computer.

We hope that you find the EQ Portal intuitive and easy to use, and we welcome any feedback or suggestions you may have on how we can further improve your online experience.

Warm regards,

*Nath Papadakis*

Head of Technology





## Logging in

To log in to your EQ Portal click:

[clientportal.eqinvestors.co.uk](https://clientportal.eqinvestors.co.uk)

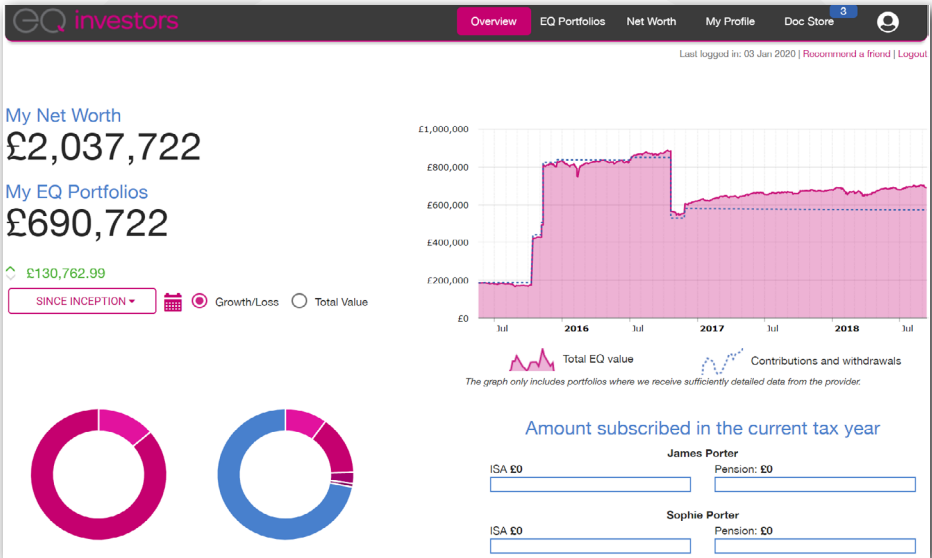
### Create an app shortcut

It's simple to set up a shortcut for direct access to the EQ Portal on your mobile. Visit the link above and click the share button  (on iOS) or open your browser menu  (on Android). Then select 'Add to Home screen'.

# Dashboard

When you log in you'll see an overview of your account showing:

- Your total wealth
- The funds we manage
- Your overall investment performance
- How much you have subscribed to ISAs and pensions this year.



# Security

Keeping your personal data safe is critical in our online world. The EQ Portal implements bank-level internet security, including:

## Strong encryption

The portal uses secure encryption, indicated by the padlock symbol in your browser address bar when you log in.

## Last logged in date

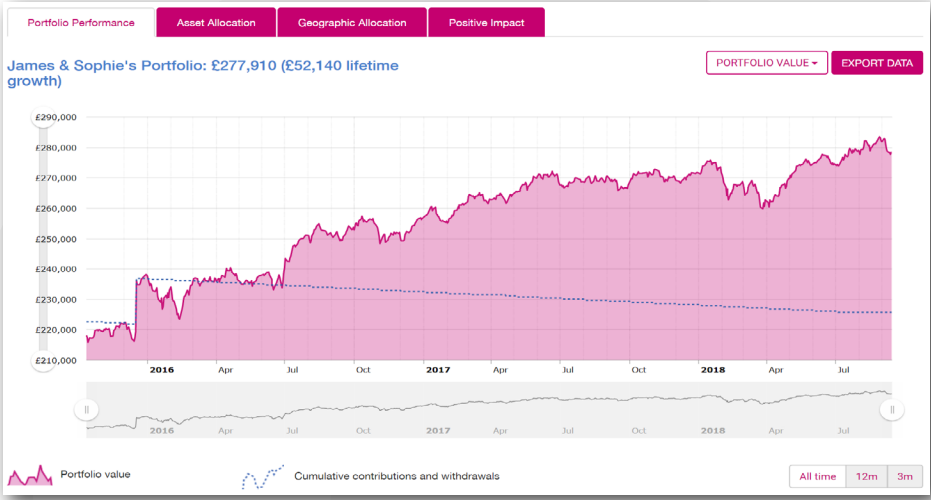
The time and date of your last login is displayed in the top right corner of the page.

## Auto-logout

You will be logged out automatically after a period of inactivity.

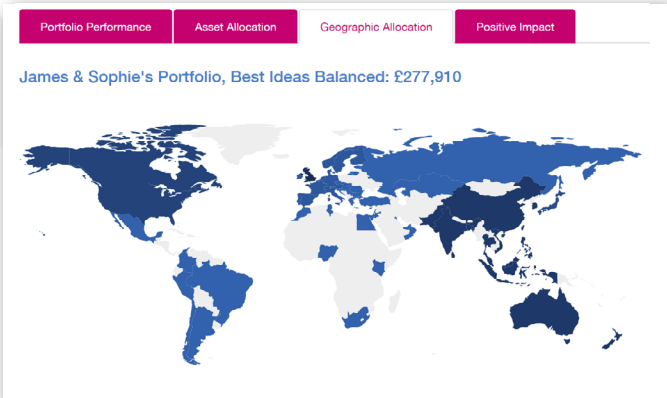
# Performance

Performance is updated daily. Click on any of your portfolios to see an interactive chart showing investment performance, contributions and withdrawals. Use the sliders to zoom in on any period.



# Allocation

You can quickly visualise the diversification and global reach of your portfolio. You can also see the funds and specific percentages we use to build your portfolio.



# Investment insight

You can drill down into more details on the funds in your portfolio with performance data and links to the factsheets.

Holding Name	Units	Cost	Latest Price	Value	% Allocation	Profit / Loss
Total				£690,722.00		£97,712.14
European Opportunities Trust Ord	4,628	£25,495.23	£8.65	£40,034.80	5.80%	£14,539.57
Liontrust Special Situations I Inc	9,159	£37,132.23	£4.23	£38,758.65	5.61%	£1,626.42
Invesco FTSE RAFI US 1000 UCITS ETF Inc	2,378	£23,932.94	£15.01	£35,713.24	5.17%	£11,780.30
						£4,509.15
						£3,609.04

## Liontrust Special Situations

A long only UK equity growth fund consisting of high quality companies with strong balance sheets



<b>Fund type</b>	UK Authorised Unit Trust
<b>Asset class</b>	Equities
<b>Sector</b>	UK
<b>Managed by</b>	Anthony Cross & Julian E C Fosh
<b>Held in EQ Portfolios</b>	<ul style="list-style-type: none"> <li>Best Ideas Cautious</li> <li>Best Ideas Adventurous</li> <li>Best Ideas Adventurous Plus</li> <li>Best Ideas Balanced Plus</li> </ul>

The Liontrust Special Situations fund was launched in 2005 following the success of the strategy implemented by Anthony Cross on the Liontrust Smaller Companies fund. This fund focuses heavily on high quality growth companies with strong balance sheets and intangible strengths that provide barriers to the respective markets. While the fund's available universe includes all listed UK companies, the managers will be structurally drawn towards smaller companies.

We like that the fund offers a unique and well defined investment process and philosophy that has consistently delivered in the past. The managers are very experienced and have developed their philosophy over time.

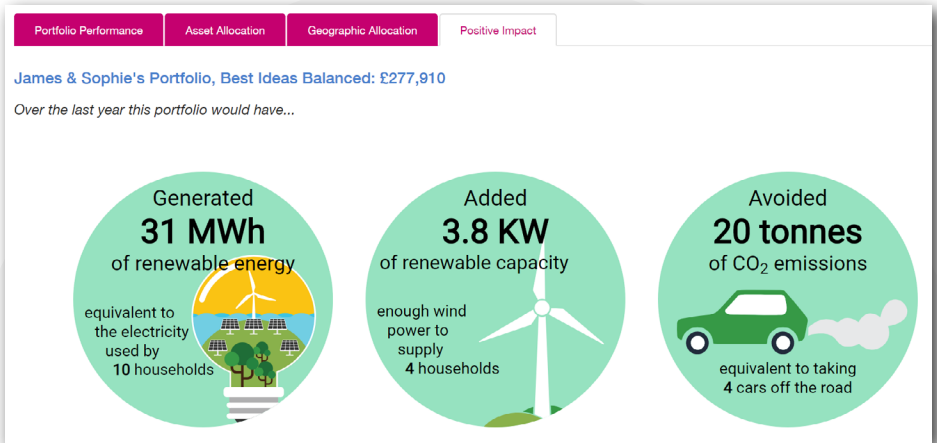
# Filtering transactions

There are a number of different ways to filter the information. For example, you can filter transactions to show income received or fees paid.

Date	Account	Type	Description	Units	Price	Credit	Debit
04/09/2018	TSTAC06	Income (dividends & interest)	Dividend on 6,998 Valued on 310818 GREENCOAT RENEWABL EUR0.01			£74.51	
04/09/2018	TSTAC05	Income (dividends & interest)	Dividend on 6,998 Valued on 310818 GREENCOAT RENEWABL EUR0.01			£22.35	
31/08/2018	TSTAC06	Income (dividends & interest)	Dividend on 82,3000 Valued on 310818 MAITLAND INSTL SVC MI TWENTYFOUR AM DYNAMIC B			£104.38	
31/08/2018	TSTAC06	Income (dividends & interest)	Dividend on 8,005.1230 Valued on 310818 AXA INVESTMENT MAN US SHT DUR HIGH YLD BD ZI			£160.66	

# Positive Impact

If you're invested in one of our Positive Impact portfolios, we'll provide a breakdown of the impact your investments have made over the last twelve months.



# Personal Balance Sheet

This summary shows what you own (assets) and what you owe (liabilities), offering a convenient snapshot of your wealth. You can add and delete entries, and export the data as a CSV file.



# My Profile

Here you can review the information we have about you, and update any of these details if your circumstances change. If you do make any changes, then your EQ planner will be informed straight away.

**My Profile**      OVERVIEW    INCOME    RETIREMENT PLANNING    TAX PLANNING

In your own words, how would you describe your financial objectives?

I would like to be able to gradually reduce my working hours at age 62 and pass on wealth to my children

How would you prioritise the following goals?

	Not important	Important but not now	Very important
Accumulating a fund for your retirement	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Accumulating a fund to purchase an asset	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establishing a strategy for retirement income	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Paying education fees	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure your family is protected	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

# EQ Vault

The EQ Vault allows us to send you correspondence and valuations securely online.

**General Correspondence**

- New** EQ-Positive-Impact-5-Year-Review.pdf  
Created on 27 Jun 2018  
Size: 4.42 MB
- New** WIncome Letter James Porter.pdf  
Created on 27 Jun 2018  
Size: 271.75 kB

**Review Report**

- New** Porter - ClientReviewDocument.pdf  
Created on 25 Jun 2018  
Size: 2.76 MB

From February 2020 we will use the EQ Vault to deliver all quarterly valuation statements digitally by default. We estimate that this will save 40,000 printed pages per year! If you would still like to receive these regulatory communications by post, you can opt out of paperless delivery by clicking the Account icon on the main menu and selecting 'Communication Preferences'.



To log in to your EQ Portal visit:

**clientportal.eqinvestors.co.uk**

Having trouble logging in? Please get in touch and we'll be happy to help.

 **020 7488 7110**

 **enquiries@eqinvestors.co.uk**

 **eqinvestors.co.uk**

**Certified**



**Corporation**

**EQ Investors, Centennium House, 100 Lower Thames Street, London EC3R 6DL**

 [eqinvestors.co.uk](http://eqinvestors.co.uk)  **020 7488 7110**  [enquiries@eqinvestors.co.uk](mailto:enquiries@eqinvestors.co.uk)  [@eqinvestors](https://twitter.com/eqinvestors)  [EQ Investors](https://www.linkedin.com/company/eqinvestors)

EQ Investors Limited ('EQ') is authorised and regulated by the Financial Conduct Authority. Registered in England and Wales at 6th Floor, 60 Gracechurch Street, London EC3V 0HR. Company Number 07223330.

EQ/0120/361

