user guide.

Navigating your way around the 'my wealth invest' app

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part of the Wealth at Work group

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The ‘my wealth invest’ app gives you an instant view of your investments and transaction history on your device.

You can also access the latest news and updates on the markets from the Investment Management team.

If you have any queries about using the app, please contact us on **0800 028 3200** or email **mywealth@wealthatwork.co.uk**

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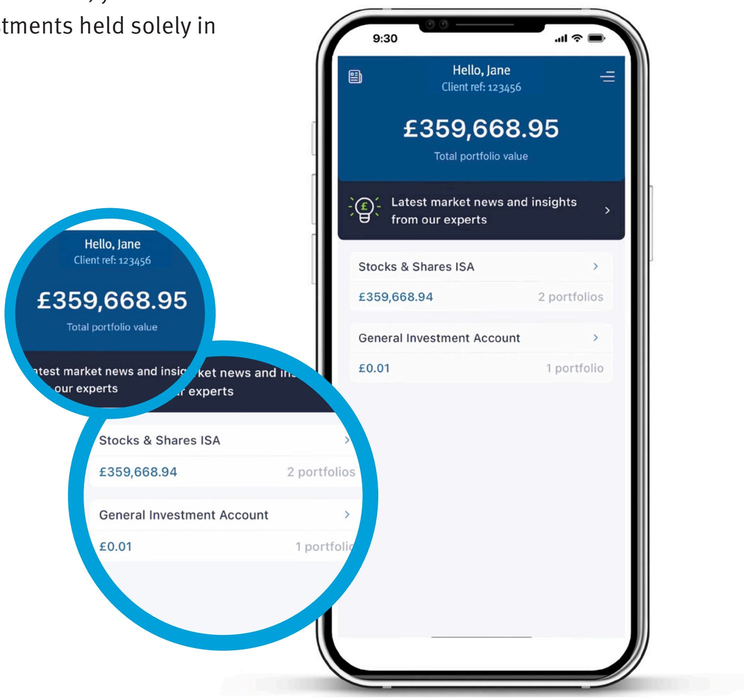
dashboard.

When you log in, you'll be able to see your main dashboard - this shows your total portfolio value at the top, and then the different wrappers you may hold with us.

The portfolio value and wrappers displayed on your app will include any joint or personal investments, you will not be able to view investments held solely in your partner's name.



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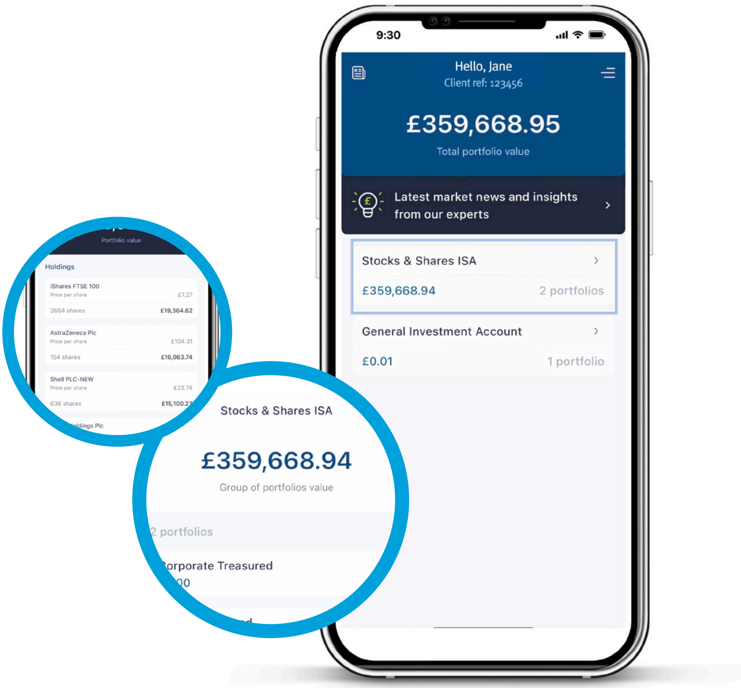
account view.

You can click into each account type to see the individual investments you hold within them.

For example, if you click into the 'Stocks & Shares ISA' you can see how much you have invested as well as details of your holdings.



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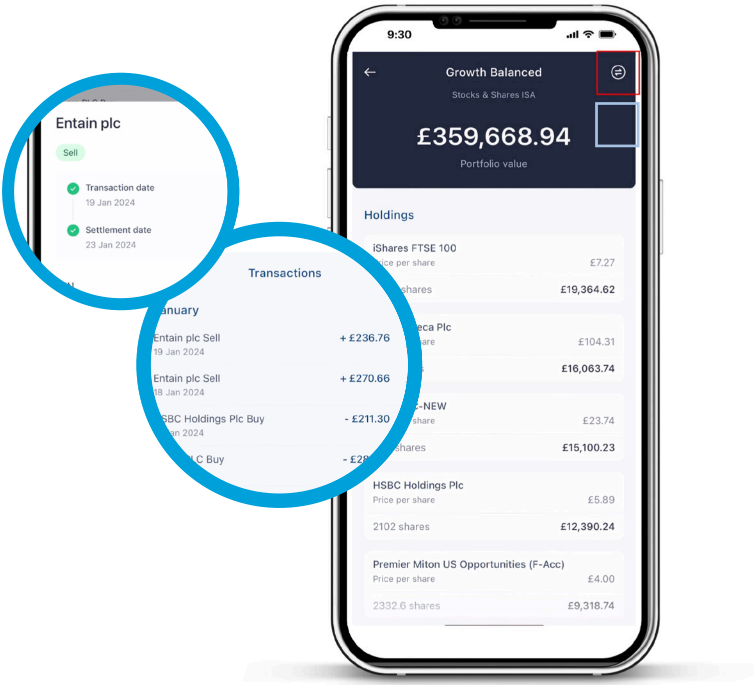
transaction history.

You can also view the transaction history for each account - click into the account you wish to view and click the icon at the top right corner of the screen.

You can then select each transaction to see further information.



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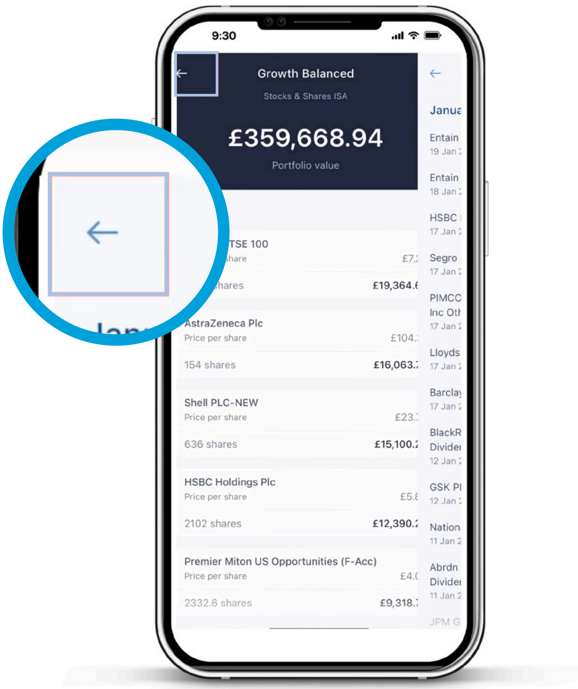
navigation.

To go back to the previous screen, click the blue arrow on the top left of the screen.



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news feature.

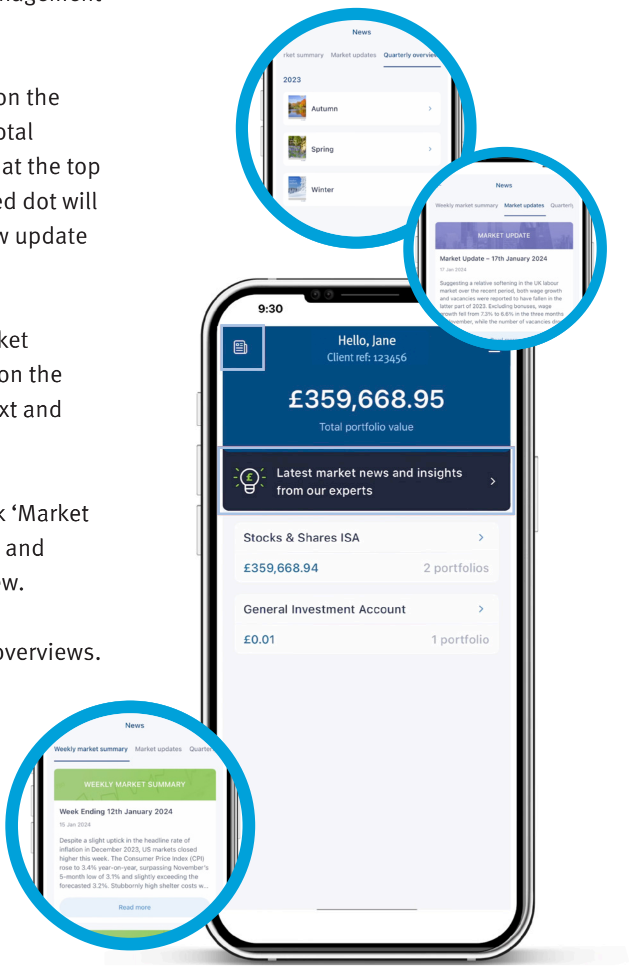
You can also view the latest news and updates from the Investment Management team through the app.

From the main dashboard, click on the black banner underneath your 'total portfolio value', or click the icon at the top left corner of the dashboard. A red dot will appear over this icon when a new update is available.

From here, click into Weekly market summary, and click 'Read more' on the summary you wish to view the text and video.

To read our Market updates, click 'Market updates' at the top of the screen and select the update you wish to view.

You can also view our Quarterly overviews.



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main menu.

To view other features, select the menu icon in the top right corner of the dashboard.

To view **your profile**, select ‘Profile’ from the list. Here you will find your personal details, including your unique client reference number.

To view **your documents**, select ‘Documents’ from the list.

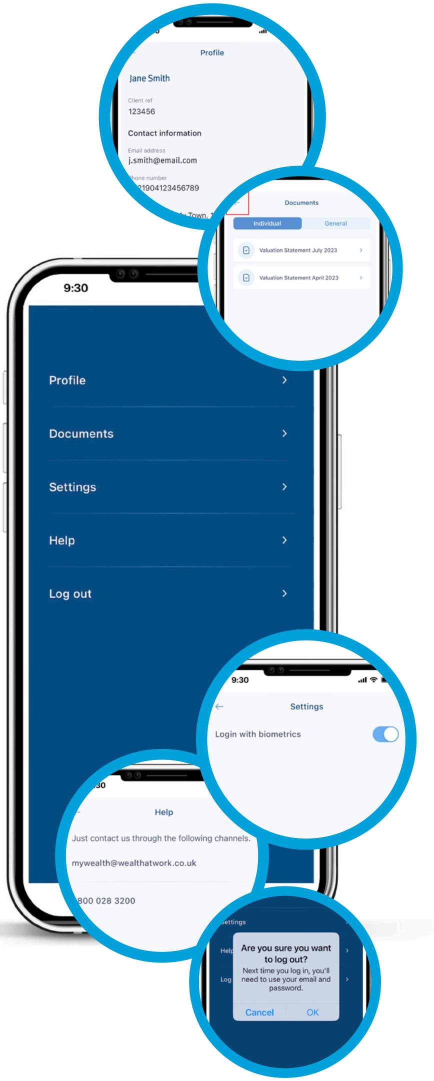
Remember, you can use the blue arrow at the top left of the screen to return to the menu list.

The ‘**Settings**’ option allows you to choose whether to enable biometric login. This is also shown in our download guide video.

The ‘**Help**’ section provides our contact details, should you wish to get in touch for any help or support.

When you choose to **log out**, you will be asked to confirm your decision.

If you wish to proceed, select ‘OK’. If not, click ‘Cancel’.



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