

service update.

2024

New web portal available
More info on page 2

We now offer paperless statements!



your statements at your fingertips.

As you know, your quarterly and annual statements are issued via post. We recently contacted you to let you know that you can now view and download your statements directly from the 'my wealth invest' app, as well our brand new web portal (see page 2 for more information).

Printing and posting statements can take time, so a digital statement may be available much earlier than a paper version.



How to access your digital statement

1. Click on the main menu, in the top right corner of the screen.
2. Select the 'documents' section.
3. Your most recent valuation statement will be at the top of the list.

Your preferences

If you have the app and/or new web portal, your preferences will be automatically set to receive paperless statements.

To carry on receiving paper statements, you can update your preferences in the app or web portal. Click on the main menu, select 'preferences' and toggle the paperless setting off.

If you don't have the app or new web portal, you will continue to receive paper statements.

By going paperless, you are benefiting from receiving statements that are:



Safe & Secure

Encryption and biometric login keep your statements secure.



Easy to use

Access all your statements in one place – anytime, anywhere.



On Demand

View, download and print your statements whenever you want.

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your portfolio: anytime, anywhere.

As we have mentioned, our new and improved web portal will provide ease of access to your investment portfolio(s) and up-to-date information on your holdings and transactions. You will also be able to view our regular market updates and summaries.

How to access:

Your access will depend on whether you are already using the 'my wealth invest' app.

- **I already have the app:** you can log in to the new web portal straight away using the same username and password as the app. www.mywealth.co.uk/login
- **I use the old online account, but don't have the app:** visit www.app.mywealth.co.uk to request your new password.
- **I have never had web or app access:** confirm your email address with us and we will send you your unique login details. Call us on **0800 028 3200** or visit www.wealthatwork.co.uk/mywealth/confirm-your-email-address

The 'my wealth invest' app

Remember, you can also get instant access to your portfolio, statements and market updates anytime, anywhere through the 'my wealth invest' app.

Once you have registered online, you can use the same log in details to access the app.

- **Quick access** - The quickest way to stay up to date with your portfolio performance.
- **Easy to use** - We have designed the app with simplicity in mind.
- **Safe and secure** - Robust features including encryption, biometric login and privacy mode keep your personal information private.

Download the app now!

Click [here](#)



are your details up to date?

We use the email address you have previously supplied to us to provide your unique login details, as well as keeping you up to date on the markets. If you do not know this email address or have not provided an email address to us previously, please call us on **0800 028 3200** or visit www.wealthatwork.co.uk/mywealth/confirm-your-email-address



coming soon...



The Chancellor of the Exchequer, Rachel Reeves, will deliver her first Budget on **Wednesday 30th October 2024**. Look out for our email summary of the announcements and market update in light of this.



Money & Pensions Service (sponsored by the Department for Work and Pensions) are hosting their annual 'Talk Money Week' from 4-8 November 2024. As part of this, they're asking businesses all over the UK to encourage people to **Do One Thing** that could help improve their financial wellbeing.

Keep a look out for our financial wellbeing tips in November. These will be sent via email – if we do not have your email address but you wish to receive these, please provide your email address by scanning the QR code now or [click here](#).





Telephone
or video-call
appointments
available



time for a review?

It is important to review your financial situation and check whether your personal financial plans are on track for the future. This is especially important for anyone thinking of retiring in the next few years.

If you would like to start making plans, please contact us to discuss or ask any questions you may have.

Call us on 01423 501 401.

Call us on 01423 501 401 or email info@mzLtd.co.uk

Visit our website at www.marshallzoing.co.uk

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