



Independent Financial
Advice and Planning

PORTAL USER GUIDE

Registration

Visit www.hfp.co.uk/portal to register for the portal.
Simply click '**Register now**' to get started.

The screenshot shows the HFP LOGIN page. At the top, it says "HFP LOGIN" followed by a horizontal line. Below the line, it says "Please enter your username and password to access the HFP client area". The main content area is divided into two sections. The first section is titled "Existing Users - Log In" and contains two input fields: "Email" and "Password". Below these fields is a checkbox labeled "Remember me next time?". At the bottom of this section are a "Log in" button and a link that says "I've lost my password". The second section is titled "New Users - Register Here" and contains the text "Your account details will be submitted for approval before your account is activated". At the bottom of this section is a "Register now" button.

Enter your details and click '**Submit**'. Your details will then securely be sent to HFP, and a member of the team will verify that they match our details before approving your access.

REGISTER FOR THE HFP DOCUMENT PORTAL

Your Details

First Name	Surname
<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>	<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>
Telephone	Email Address
<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>	<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>
Date of Birth	
<input style="width: 95%; height: 25px; background-color: #ccc;" type="text" value="31/12/1970"/>	
Format: 31/12/1970	

Password

Password	Confirm Password
<input style="width: 95%; height: 25px; background-color: #ccc;" type="password"/>	<input style="width: 95%; height: 25px; background-color: #ccc;" type="password"/>

Please enter a password that is 8 or more characters long and includes a mix of uppercase and lowercase letters, numbers and punctuation.

Address

Address Line 1	Address Line 2
<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>	<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>
Town	County
<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>	<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>
Postcode	Country
<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>	<input style="width: 95%; height: 25px; background-color: #ccc;" type="text"/>

Receiving new documents

When HFP upload new documents to the portal, you will be sent an email informing you of this. Simply click the link in the email to go directly to the portal.

New documents available from HFP

Dear **Jonathan Rider**,

New documents have been uploaded to the HFP website for you to download.

[Click here to log in and view the documents](#)

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When you are at the login screen, enter your email and the password you chose when you registered to log on.

HFP LOGIN

Please enter your username and password to access the HFP client area

Existing Users - Log In

Email	Password
<input type="text"/>	<input type="password"/>

Remember me next time?

[Log in](#) [I've lost my password](#)

New Users - Register Here

Your account details will be submitted for approval before your account is activated

[Register now](#)

You will see any new documents, together with any notes HFP have sent you. Simply click download on the document you would like to view.

CLIENT PORTAL

My Documents

Date	Notes	Download
19/07/2019 14:06pm	Test document.	Download

You will then be taken to the below page, where you can download the documents. The document will be password protected with your date of birth, with all punctuation removed. This is an additional security measure so that even if somebody has your log in details, they still cannot access any documents.

You are also able to detail any documents you have already downloaded.

DOWNLOAD DOCUMENTS

Click the button below to download your document(s) in a ZIP file.

The password for the ZIP file is your date of birth with all punctuation removed. For example, if your date of birth is **25/01/1980**, your password will be **25011980**.

[Download Now](#)

Notes: Test document.

Delete Documents

Click the button below to delete the document(s) from the website once you have downloaded them.

[Delete Documents](#)

Sending documents

If you want to securely send documents to HFP, then after logging in click '**Upload documents**'.

Upload Documents

Click the button below to upload documents that will be sent to HFP. Your documents will be stored securely, password protected and deleted once we have obtained copies of them.

Upload Documents

You will be taken to a page that lets you upload any document you wish, and also to type any notes that will also be sent. Please note that jpg files cannot be opened so please do not send these.

CLIENT PORTAL

Click below to select your documents, or drag and drop them from your computer. You can also enter any notes into the text area below. Once you have finished uploading your documents, click the "Send Documents" button to send them to us.

Documents

Attach files by dropping them in here, or You can also [\[browse your computer\]](#)

Notes

Send Documents

Once you have sent your documents, HFP are able to download these and then delete them.

Resetting your password

If you forget your log in password, simply click on **'I've lost my password'** and enter your email address. You will then be sent a link to reset your password.

HFP LOGIN

Please enter your username and password to access the HFP client area

Existing Users - Log In

Email	Password
<input type="text"/>	<input type="password"/>

Remember me next time?

[Log in](#) [I've lost my password](#)

New Users - Register Here

Your account details will be submitted for approval before your account is activated

[Register now](#)

LOST PASSWORD

Enter your e-mail address and we will send you a link with which you can reset your password

Email

[Send me the password reset link](#)