

A photograph of an elderly couple sitting on a couch, looking at a laptop screen. The woman has white hair and is smiling, while the man has grey hair, glasses, and a beard, also smiling. They are both looking at the screen, which is partially visible at the bottom of the frame. The background is a bright, out-of-focus interior.

# TPO Wealth

Your entire financial life in one place

**tpo**  
Wealth



**A clear, uncomplicated view of your finances in one place. Your investments, savings, pensions, insurances, bank accounts, credit cards, store cards, mortgages, loans and property alongside all the associated paperwork.**

On your desktop and as an app on your tablet and smart phone, your finances are beautifully brought together under a single login accessible to you at any time, wherever you are.



## With TPO Wealth you can



**View your investment portfolio**



**Quickly access your insurance details**



**Track your property values**



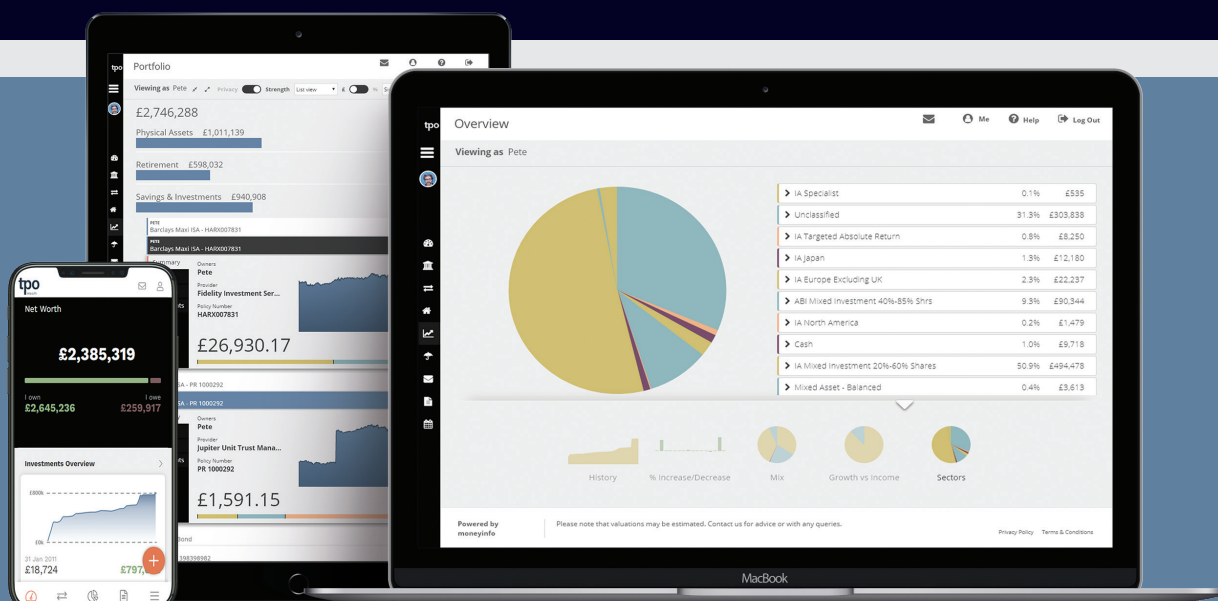
**Manage your income and spending**



**Safely store all your important documents**



**Be reminded about your renewals, income and payments**

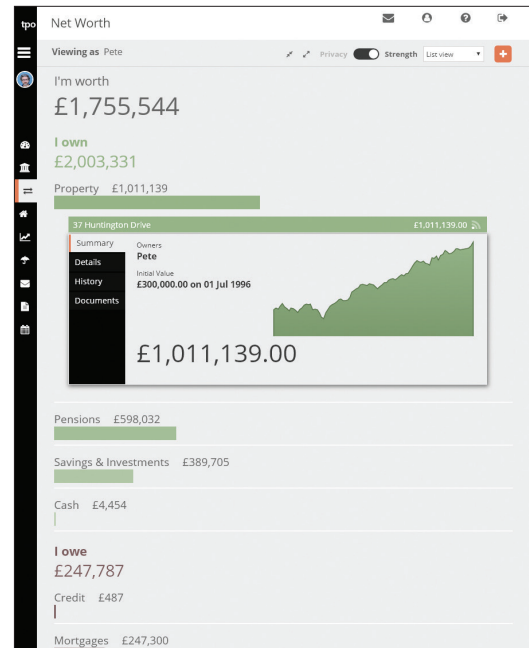


# Keep track of your investments

**TPO Wealth** makes it easy to see how your investments are doing. Valuations are updated daily and build into a history across your entire portfolio.

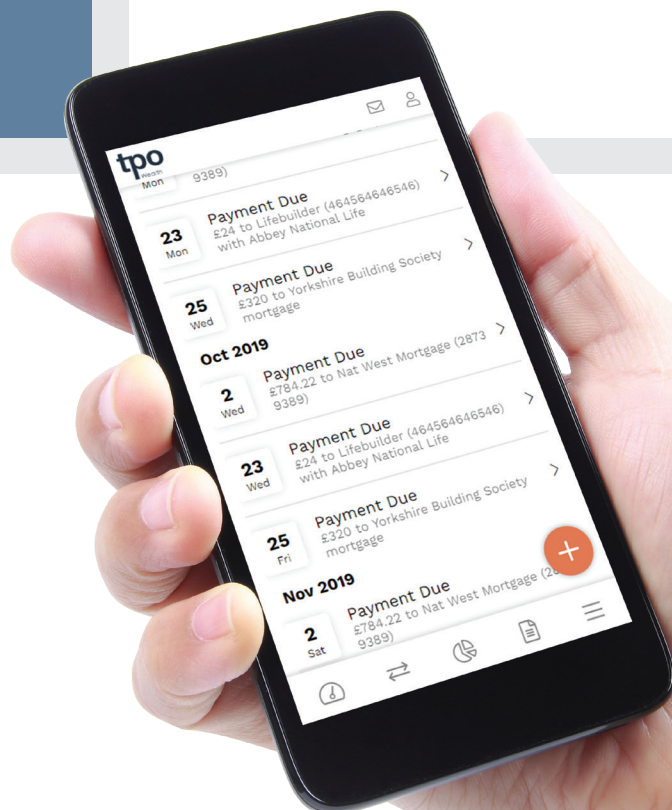
## Everything summarised

Your dashboard gives you a snapshot of your entire financial life and an easy navigation point to everything you need. Personalise it to display the information that matters to you most.



## Your personal financial assistant

Keep an eye on upcoming renewals, payments, income and maturities. Add your own key events such as MOTs, road tax and HMRC payments.



# Keep your important documents safe



Store digital copies of all your paperwork including wills, property deeds, insurance contracts, policy documents, valuations and statements. **TPO Wealth** keeps your important financial documents safe, secure and accessible.

Your adviser can share documents and reports with you so you can read them whenever it's convenient. Simply log in to **TPO Wealth** from any device and your important financial documents will be there waiting for you.



# See where your money goes

Access your bank accounts, credit cards and store cards together under one secure login. **TPO Wealth** helps you keep track of your income and spending and see where your money is really going.

# Your property valued

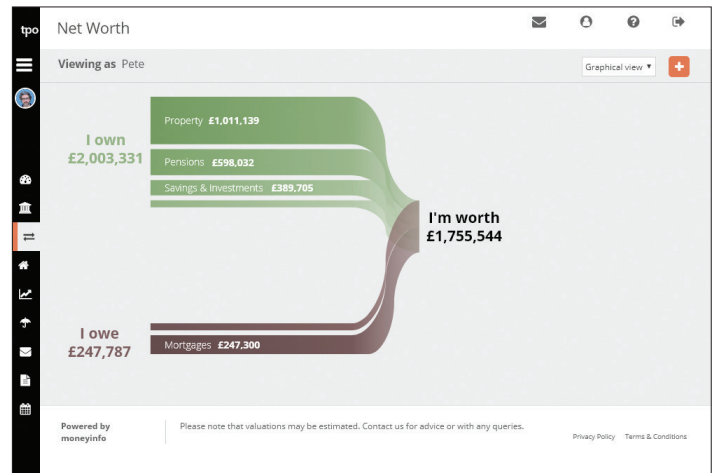
Want to know what your home is worth? Enter your house number and postcode and **TPO Wealth** will display your property details and track its value using Land Registry data.





# A true picture of your net worth

**TPO Wealth** tracks the value of your assets and liabilities over time. For you, your partner, your dependants, your trusts, your companies: all brought together into a single view.



## Access your insurances when you need them

Your policy details are stored next to the things they relate to. Your home insurance next to your home, your car insurance next to your car. In the event of an emergency you can access the information you need quickly and easily.

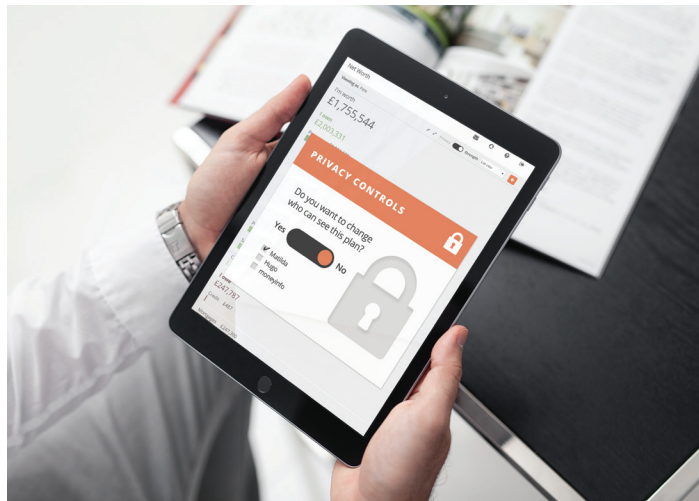
## Secure and timely communications

**TPO Wealth** ensures that your personal data is exchanged using only the most secure methods. Notifications alert you when important messages or documents are waiting to be read.



# Enhanced privacy controls

Our privacy controls allow you to decide who your information is shared with, for example your partner or your adviser. Set your privacy defaults when you first log in and easily change this for individual financial items you add to your account. **TPO Wealth** ensures that you are always in control of your data.



## Your data is always protected

We take the security of your personal and financial information very seriously and **TPO Wealth** makes sure that your data is safeguarded using bank level security and encryption. Our mobile app is further protected with your own six-digit pin and registered to your personal device.

## And finally, for your peace of mind

If an emergency situation arises, where will the important details about your assets, liabilities, property and insurances be found?

**TPO Wealth** brings all this information together in one place with all the associated paperwork, making it accessible should it be needed.







## Putting you in control of your finances

- Your personal digital filing cabinet with all your finances organised and updated.
- It's financial peace of mind in your pocket, knowing that your most valuable records are safe and accessible.
- No need to log on to multiple financial sites, helping to reduce the risk of online fraud.
- Keep all of your financial records together and easily track your income and expenditure.
- Access your information when you need it from any device.



Find out more

# Access your online portal soon

wealth.theprivateoffice.com

**Call:** 0333 323 9061

**Visit:** [www.tpowealth.com](http://www.tpowealth.com)

**Email:** [support@tpowealth.com](mailto:support@tpowealth.com)



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