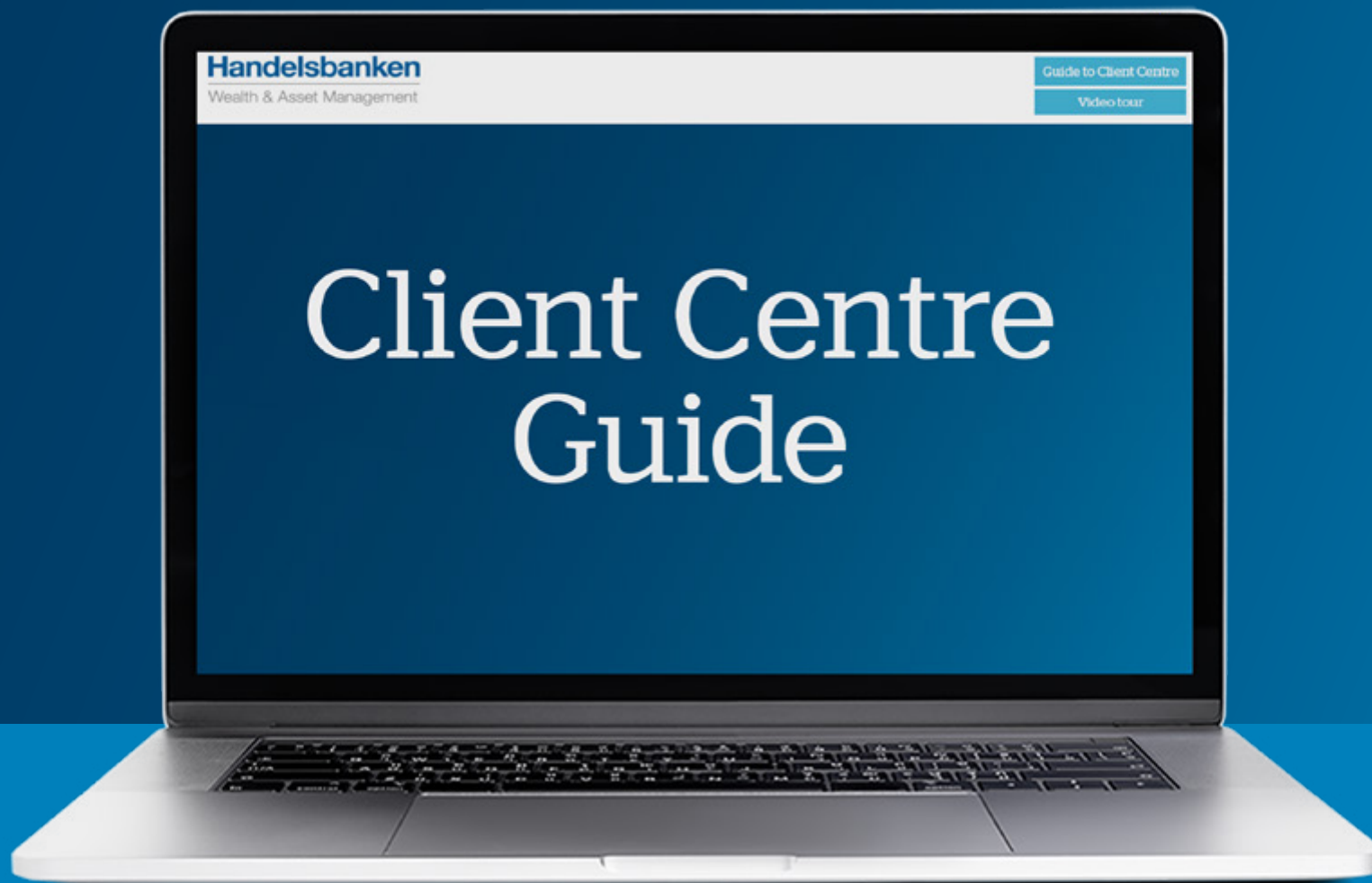


Handelsbanken

Wealth & Asset Management



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How to login

Once you have opened
www.wealthandasset.handelsbanken.co.uk

you will see the 'Client Login' button in the top right hand corner of the home page.

By clicking on this button, you will be taken to the login page of Client Centre.

Enter your username and password.

For technical help please contact:
clientsupport.hwam@handelsbanken.co.uk

Terms and conditions of the use of the website can be viewed via the link shown just below the login fields.

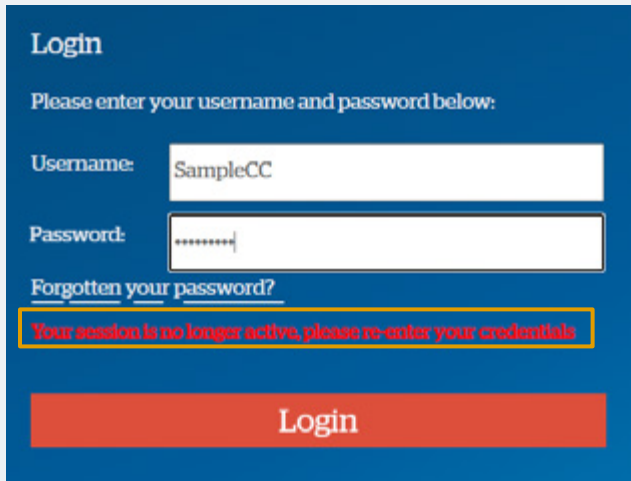
To change your password, see page 5 for details

Desktop computer and tablet view

Mobile view



Login error messages explained



The screenshot shows a login form with a blue header and a red 'Login' button. The error message is highlighted in a yellow box.

Login

Please enter your username and password below:

Username: SampleCC

Password: *****

[Forgotten your password?](#)

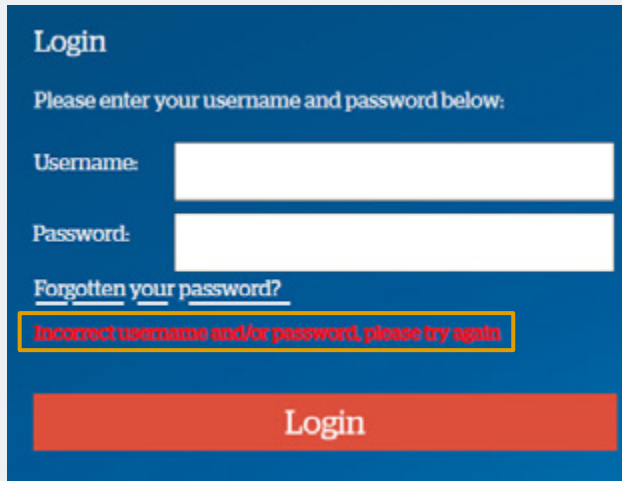
Your session is no longer active, please re-enter your credentials

Login

Time out

We have a security timeout for inactivity for 20 minutes

Re-enter username and password if you get this message



The screenshot shows a login form with a blue header and a red 'Login' button. The error message is highlighted in a yellow box.

Login

Please enter your username and password below:

Username:

Password:

[Forgotten your password?](#)

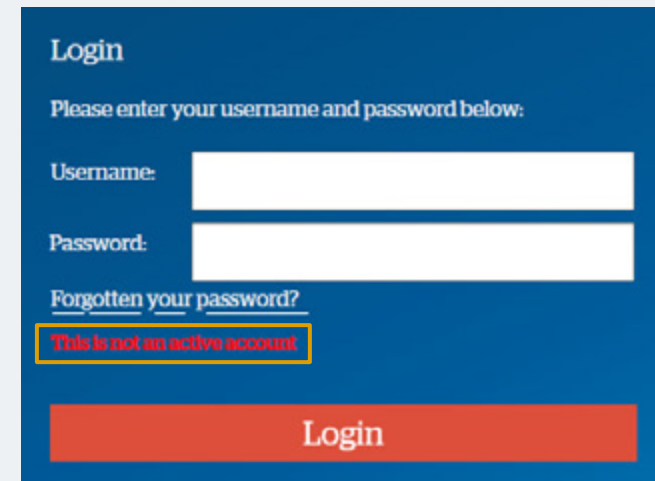
Incorrect username and/or password, please try again

Login

Incorrect information

If you know your username, but forgotten your password click on the 'forgotten your password' link

If you are unsure of username contact
clientsupport.hwam@handelsbanken.co.uk



The screenshot shows a login form with a blue header and a red 'Login' button. The error message is highlighted in a yellow box.

Login

Please enter your username and password below:

Username:

Password:

[Forgotten your password?](#)


This is not an active account

Login

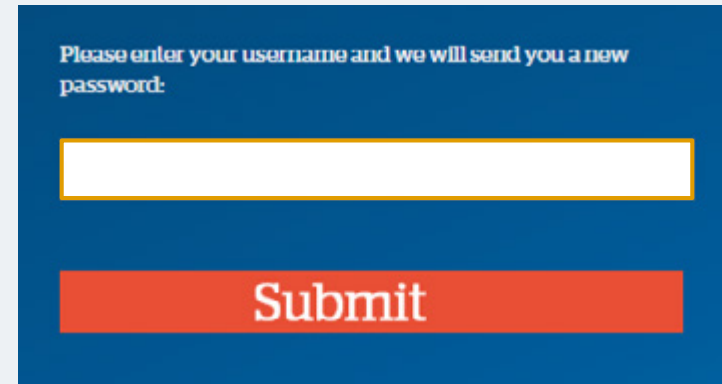
Missing information

Check your email or mobile for a temporary username and then you can follow the steps to create a unique password

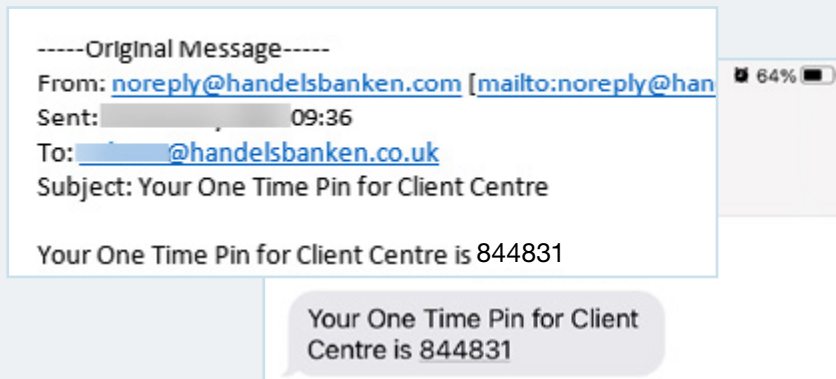
How to reset your password



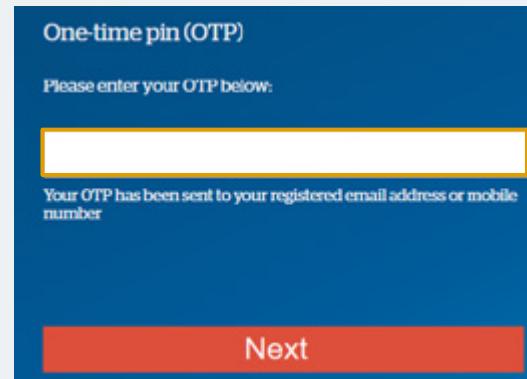
1 Click on the **Forgotten your password?** link



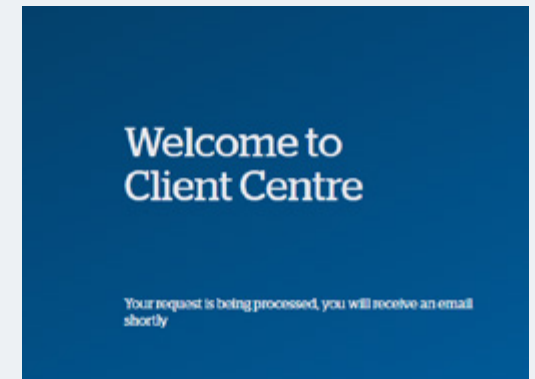
2 Enter you **username** and click **Submit**



3 You will then receive a **pin** via **email** or **mobile**

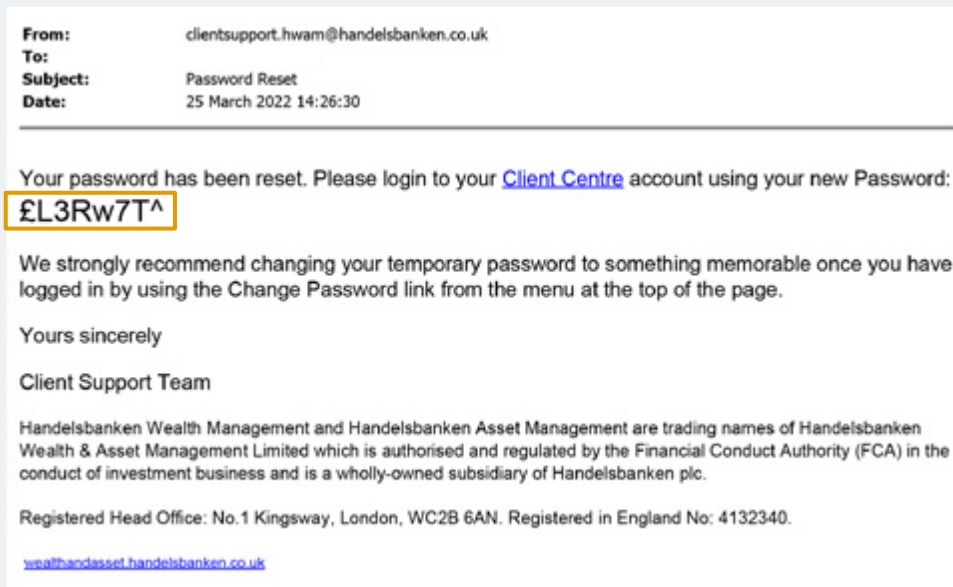


4 Enter the **One-time Pin (OTP)**

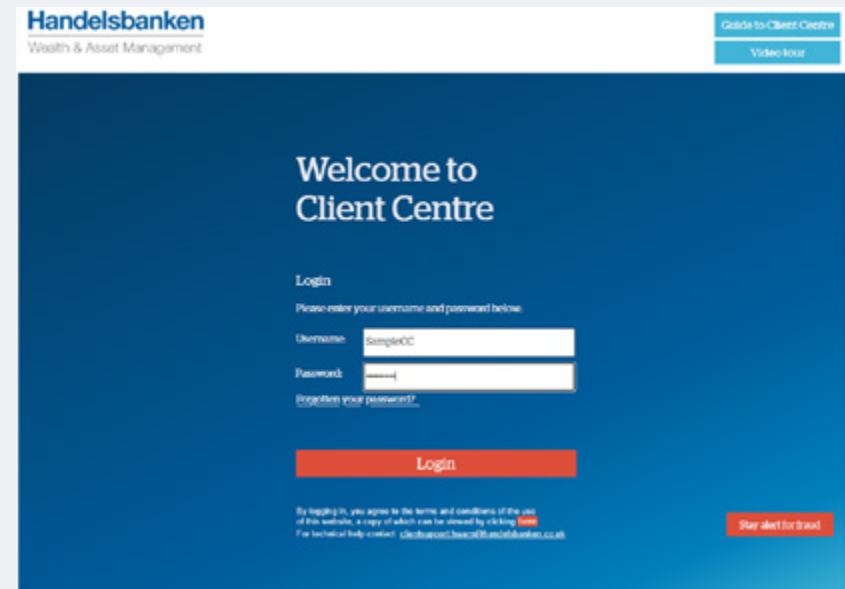


5 A **temporary password** will be sent to you **via email**

How to reset your password (continued)



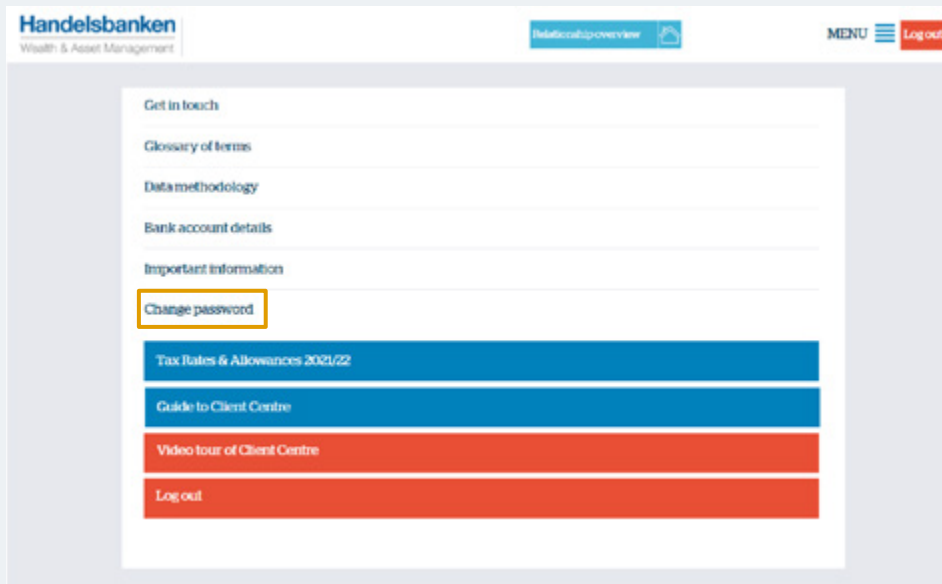
6 Once you've received a new **temporary password** via email



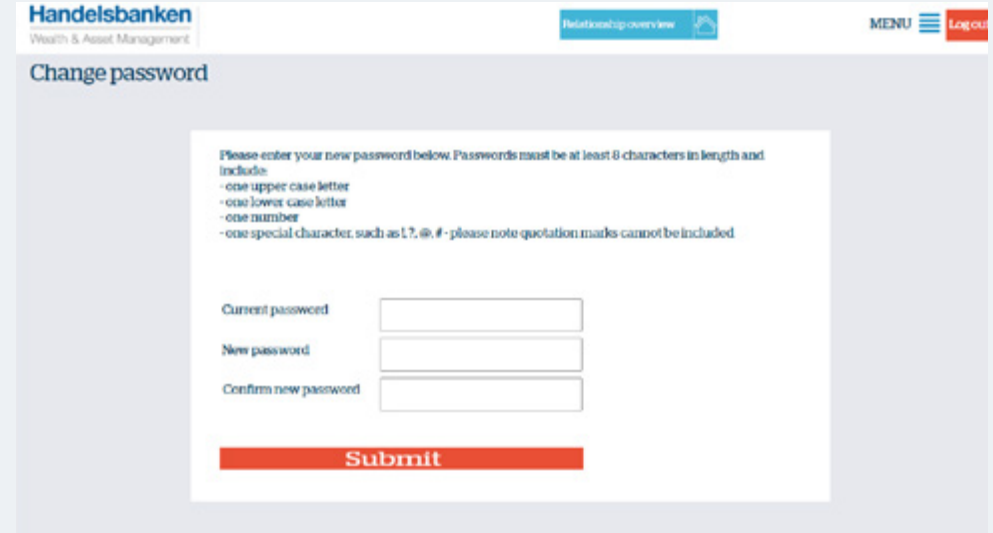
7 Go back to the login screen to enter the details

If you copy and paste the temporary password from the email, please ensure you don't copy any additional space before or after the password

How to change your temporary password



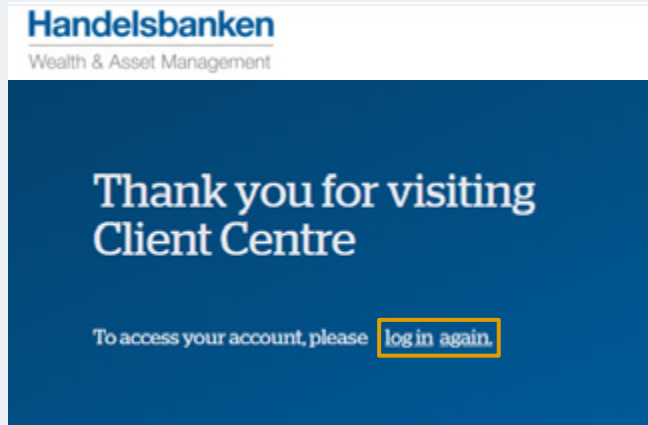
- 1 Navigate back to the **menu** in the top right hand corner and click on the **Change password** button



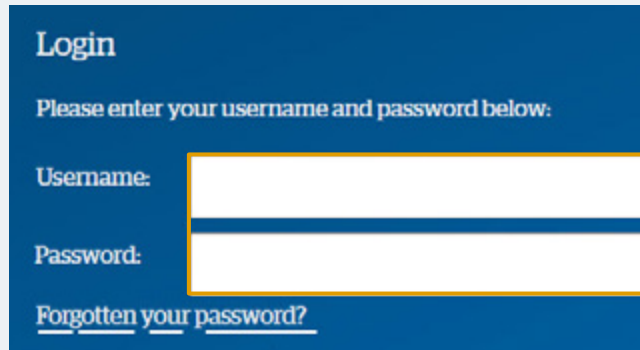
- 2 In the **current password** field enter your **temporary password**. In the **New password** and **Confirm new password** fields enter a new password of your choice.

Please note: passwords must be at least 8 characters in length, include one upper case letter, one lower case letter, one number and one special character (i.e. !, ?, @, # - please note quotation marks cannot be included).

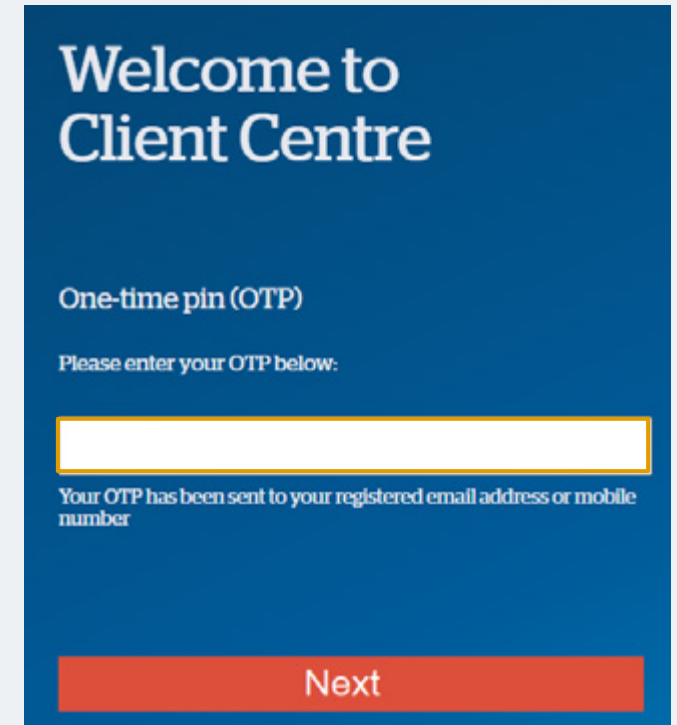
Login after you have changed your password



- 1 Click on the **login again** link



- 2 At the login page enter your **username** and **your password** (the one you have just chosen and set)



- 3 You will be asked to enter another **OPI** which will be sent to your preferred contact method (usually your email address or mobile) and is a **6-digit numeric pin**

Navigating the landing page

View all the **reports** within your username from this button

Use the dropdown here to **switch accounts**

Navigate to **other pages** using the **menu**

The screenshot shows the 'Relationship overview' page for Mr Z. Smith. At the top, there's a navigation bar with 'Go paperless', 'Relationship overview', and a dropdown for 'Mr Z. Smith'. A 'MENU' button and 'Log out' link are also present. Below the navigation bar, the main content area is titled 'Relationship overview' and includes a 'View all reports here' link. The page features two video players: 'Explaining the changes to our funds' and 'Quarterly investment update'. Below the videos, there are links for 'market and economic updates' and 'Investment team updates'. A section titled 'Current portfolio value' shows a value of £237,783.67 as at 11 Dec 24. To the right of this value is a 'Show closed accounts' toggle set to 'No'. Below this is a table of accounts with columns: Accounts, Client ID, Main, ISA, Pension, Investment Bond, Other, and Account total. The table lists 'Mr Z. Smith' and a 'Total' row. A 'Detail' button with a right arrow is located to the right of the 'Total' row. A 'Download the table here' link with an 'XLS' icon is also present.

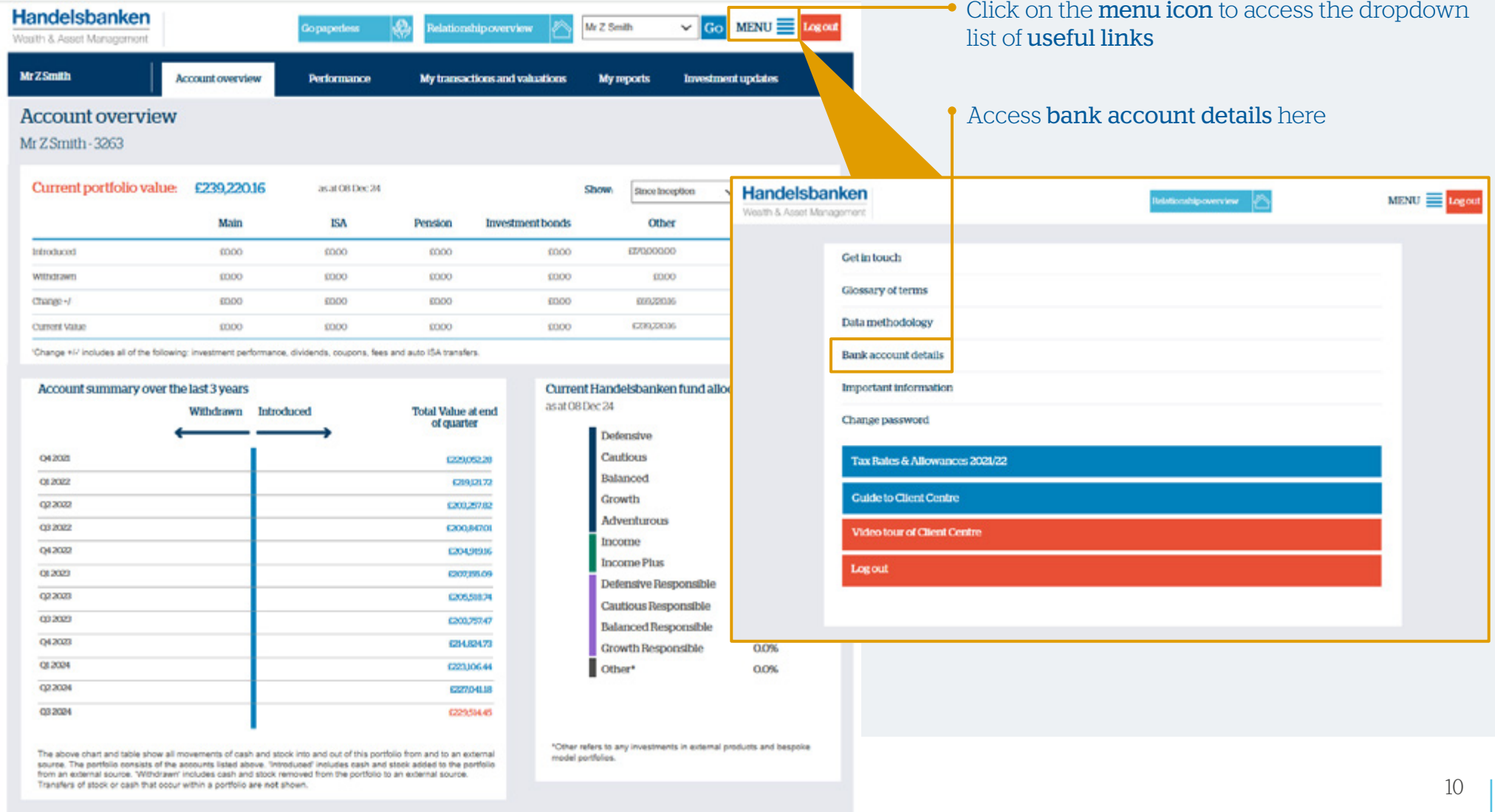
Accounts	Client ID	Main	ISA	Pension	Investment Bond	Other	Account total
Mr Z. Smith	3653	£000	£000	£000	£000	£237,783.67	£237,783.67
Total		£000	£000	£000	£000	£237,783.67	£237,783.67

All accounts within your username are listed here

Click here to see closed accounts

Drilldown into your accounts by clicking the **detail** button (see page 11)

Accessing the menu and bank account details



The screenshot displays the Handelsbanken Wealth & Asset Management client portal. The top navigation bar includes the Handelsbanken logo, a 'Go paperless' button, a 'Relationship overview' button, a user profile dropdown for 'Mr Z Smith', a 'Go' button, a 'MENU' button (highlighted with an orange box), and a 'Log out' button. Below the navigation bar, the 'Account overview' page is shown for 'Mr Z Smith - 3263'. The page features a table of the current portfolio value (£239,220.16 as at 08 Dec 24) and an account summary over the last 3 years. A dropdown menu is open from the 'MENU' button, showing a list of links: 'Get in touch', 'Glossary of terms', 'Data methodology', 'Bank account details' (highlighted with an orange box), 'Important information', and 'Change password'. Below the menu, there are buttons for 'Tax Rates & Allowances 2021/22', 'Guide to Client Centre', 'Video tour of Client Centre', and 'Log out'.

Click on the **menu icon** to access the dropdown list of useful links

Access bank account details here

Account overview
Mr Z Smith - 3263

Current portfolio value: **£239,220.16** as at 08 Dec 24

	Main	ISA	Pension	Investment bonds	Other
Introduced	£0.00	£0.00	£0.00	£0.00	£239,220.16
Withdrawn	£0.00	£0.00	£0.00	£0.00	£0.00
Change +/-	£0.00	£0.00	£0.00	£0.00	£0.00
Current Value	£0.00	£0.00	£0.00	£0.00	£239,220.16

*Change +/- includes all of the following: investment performance, dividends, coupons, fees and auto ISA transfers.

Account summary over the last 3 years

	Withdrawn	Introduced	Total Value at end of quarter
Q4 2021			£229,052.20
Q1 2022			£219,321.72
Q2 2022			£203,257.82
Q3 2022			£200,847.01
Q4 2022			£204,919.16
Q1 2023			£203,368.09
Q2 2023			£205,518.74
Q3 2023			£203,757.47
Q4 2023			£214,824.73
Q1 2024			£223,106.44
Q2 2024			£227,041.18
Q3 2024			£229,554.45

The above chart and table show all movements of cash and stock into and out of this portfolio from and to an external source. The portfolio consists of the accounts listed above. 'Introduced' includes cash and stock added to the portfolio from an external source. 'Withdrawn' includes cash and stock removed from the portfolio to an external source. Transfers of stock or cash that occur within a portfolio are not shown.

Current Handelsbanken fund allocation
as at 08 Dec 24

Defensive	
Cautious	
Balanced	
Growth	
Adventurous	
Income	
Income Plus	
Defensive Responsible	
Cautious Responsible	
Balanced Responsible	
Growth Responsible	0.0%
Other*	0.0%

*Other refers to any investments in external products and bespoke model portfolios.

Handelsbanken
Wealth & Asset Management


- Get in touch
- Glossary of terms
- Data methodology
- Bank account details**
- Important information
- Change password
- Tax Rates & Allowances 2021/22
- Guide to Client Centre
- Video tour of Client Centre
- Log out

How to access account level information

This page is the **overview level** of your account, and is accessed via the **details** button

This button will return you to the landing page

Use the dropdown here to **switch accounts**


Wealth & Asset Management

Go paperless

Relationship overview

Mr Z Smith

Go

MENU

Logout

Mr Z Smith

Account overview

Performance

My transactions and valuations

My reports

Investment updates

Account overview

Mr Z Smith - 3263

Current portfolio value:
£216,473.58

as at 07 Feb 22

Show:

Since Inception

Go

XLS

	Main	ISA	Pension	Investment bonds	Other	Total
Introduced	£0.00	£0.00	£0.00	£0.00	£170,000.00	£170,000.00
Withdrawn	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Change +/-	£0.00	£0.00	£0.00	£0.00	£46,473.58	£46,473.58
Current Value	£0.00	£0.00	£0.00	£0.00	£216,473.58	£216,473.58

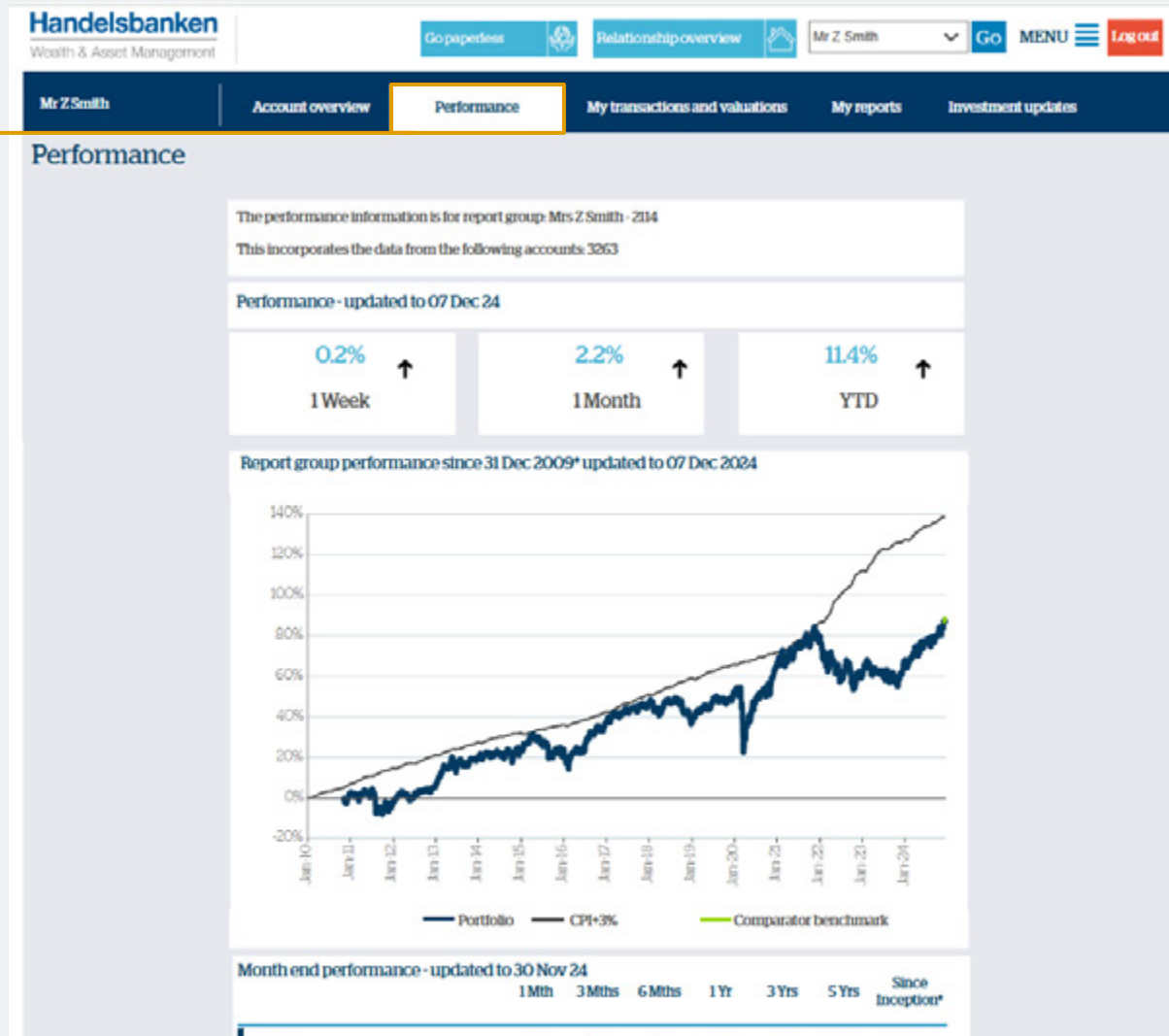
*Change +/- includes all of the following: investment performance, dividends, coupons, fees and auto ISA transfers.

Different **time periods** can be selected here

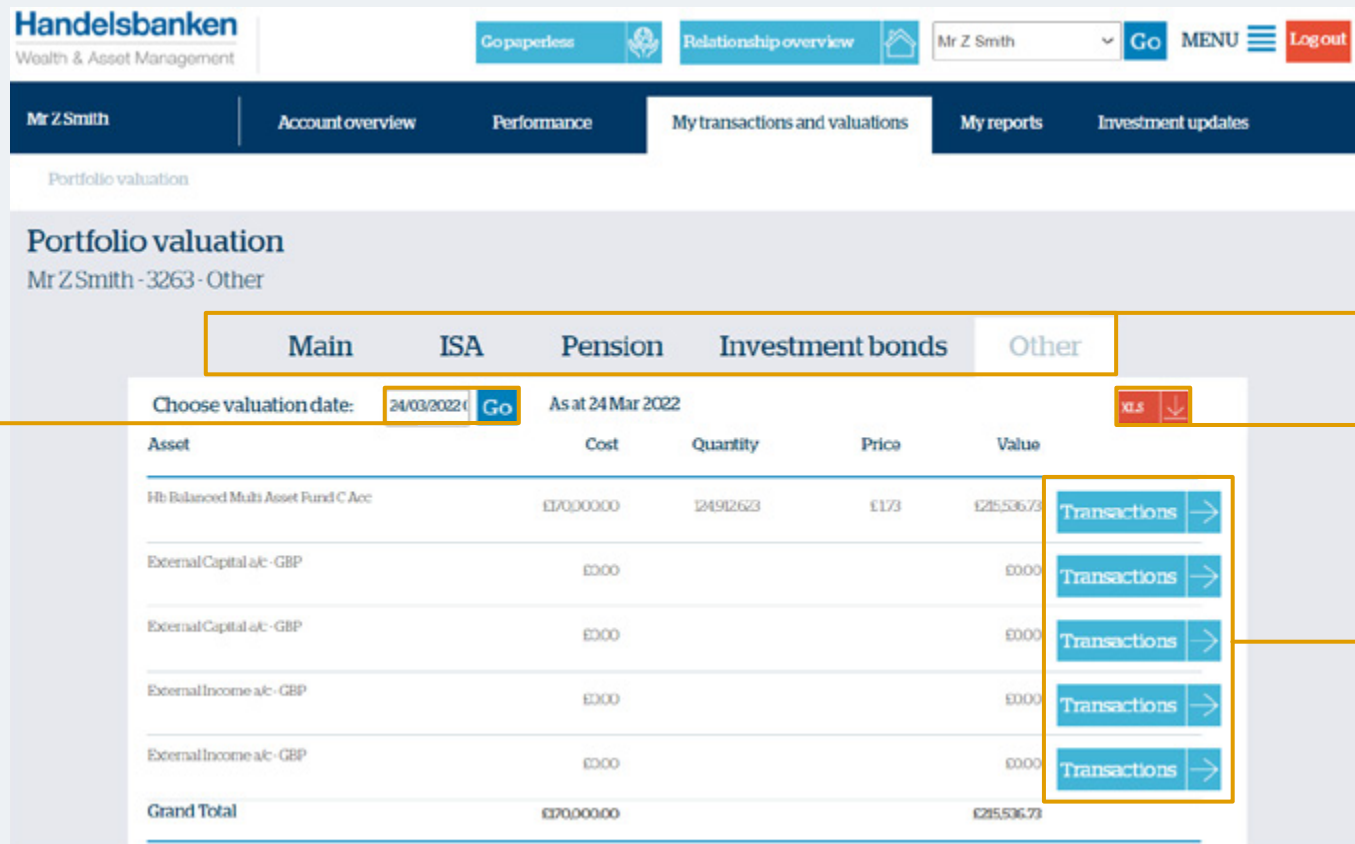
This button enables you to export the information to **Excel**

Accessing portfolio performance





Access performance data via the **Performance** tab



How to view and download portfolio valuations



Handelsbanken
Wealth & Asset Management


Go paperless  Relationship overview  Mr Z Smith  Go MENU  Log out

Mr Z Smith | Account overview | Performance | My transactions and valuations | My reports | Investment updates

Portfolio valuation

Portfolio valuation
Mr Z Smith - 3263 - Other

Main | ISA | Pension | Investment bonds | Other

Choose valuation date: 24/03/2022 Go As at 24 Mar 2022 XLS 

Asset	Cost	Quantity	Price	Value	Transactions
Hb Balanced Multi Asset Fund C Acc	£170,000.00	124912623	£1.73	£215,536.73	Transactions →
External Capital a/c - GBP	£0.00			£0.00	Transactions →
External Capital a/c - GBP	£0.00			£0.00	Transactions →
External Income a/c - GBP	£0.00			£0.00	Transactions →
External Income a/c - GBP	£0.00			£0.00	Transactions →
Grand Total	£170,000.00			£215,536.73	

You can **change the date** here to view the portfolio valuation at a different date

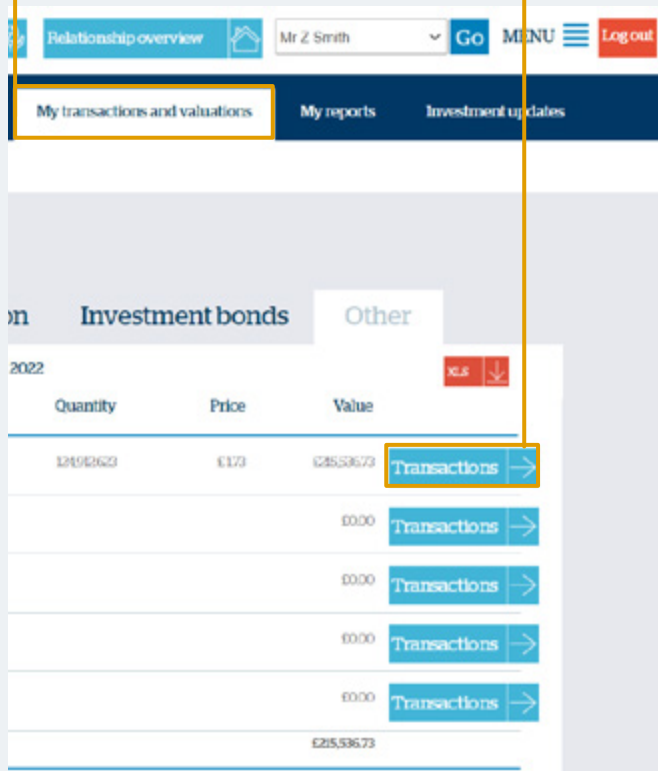
Switch between **wrappers** by clicking on these tabs

This button enables you to export the table to **Excel**

Transactions can be viewed via these buttons (see page 14)

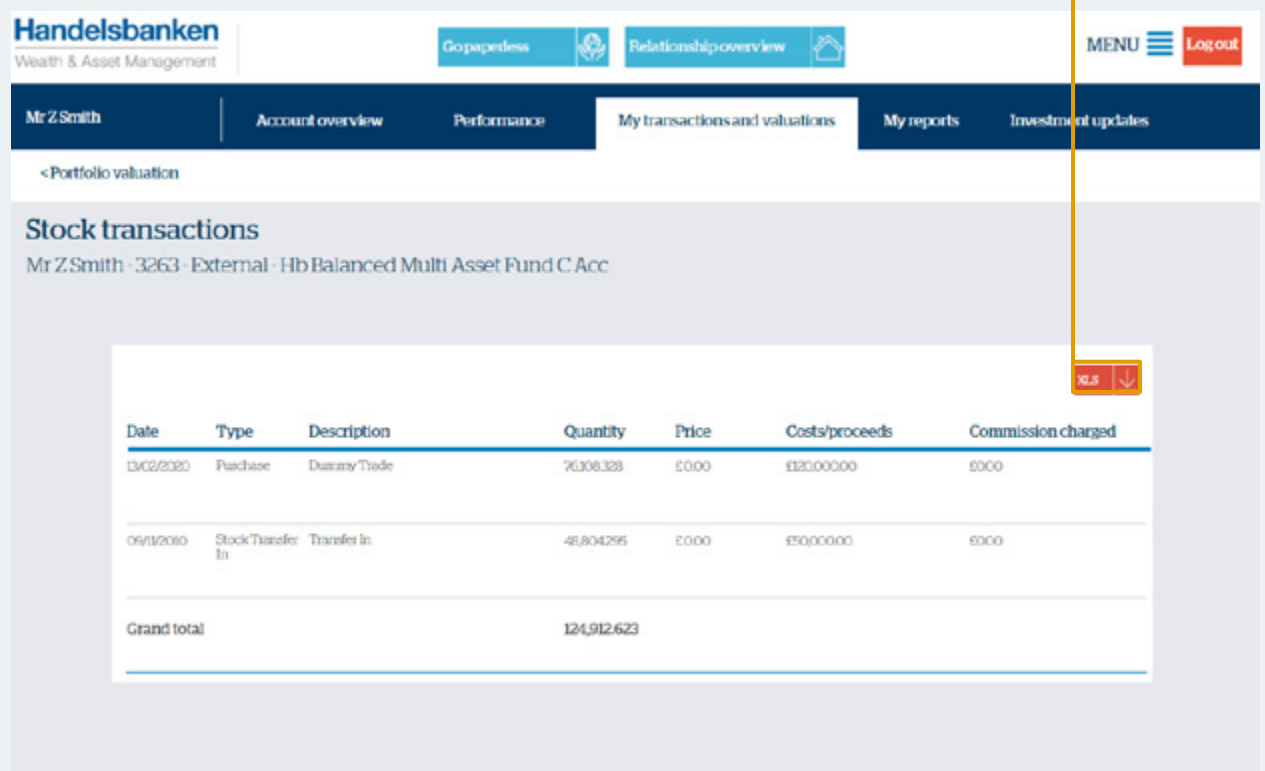
How to view and download transactions

From the **transactions and valuations** tab, click on a **blue transactions** button



Quantity	Price	Value
121,912,623	£173	£25,536.73
		£0.00
		£0.00
		£0.00
		£0.00
		£0.00
		£25,536.73

Select the **Excel** button to **download** the table

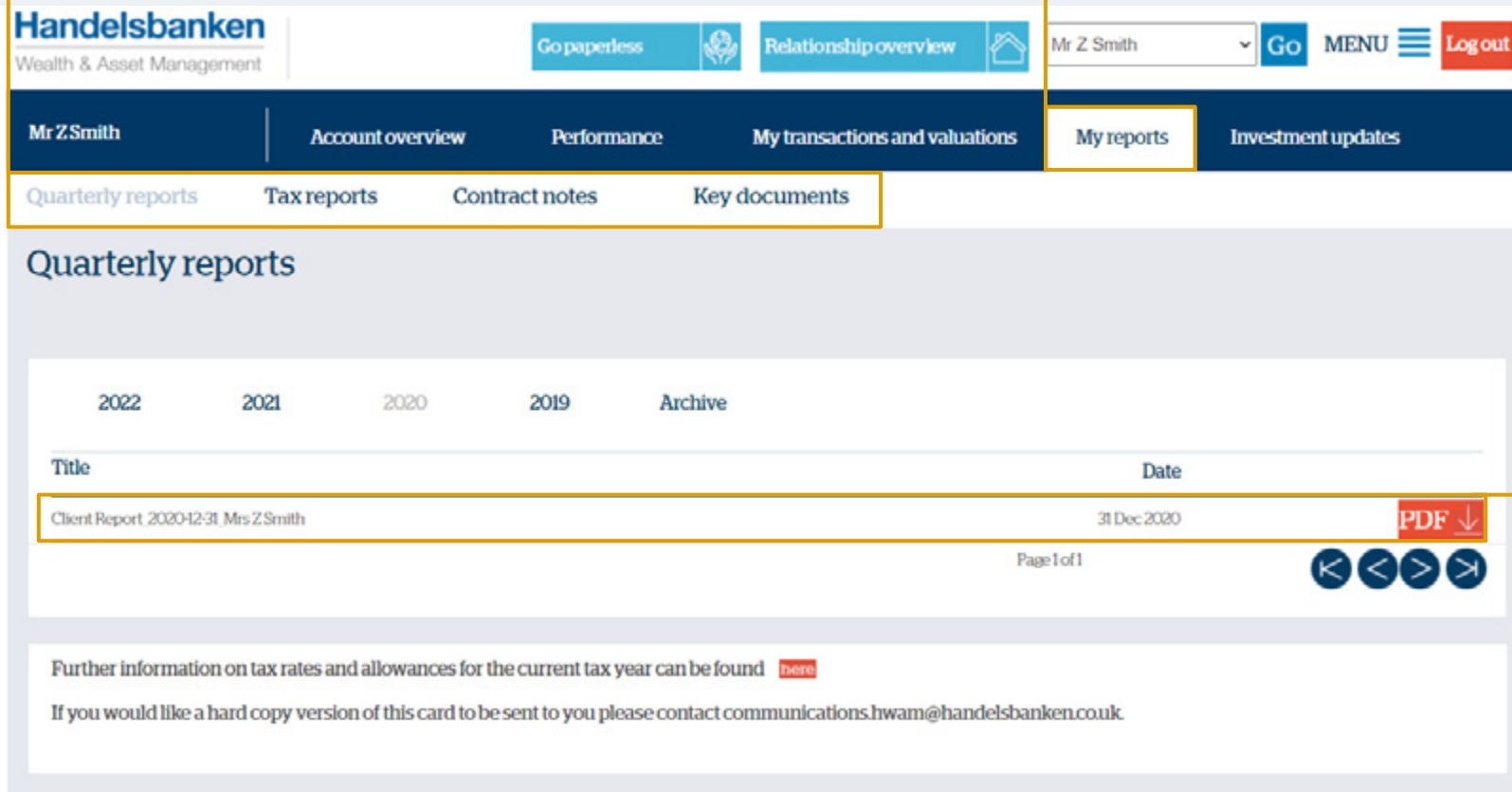


Date	Type	Description	Quantity	Price	Costs/proceeds	Commission charged
13/02/2020	Purchase	Dummy Trade	76,308,328	£0.00	£20,000.00	£0.00
09/11/2018	Stock Transfer In	Transfer In	48,804,295	£0.00	£50,000.00	£0.00
Grand total			124,912,623			

How to view and download reports

Select other reports from these tabs

Select the 'My reports' tab



The screenshot shows the Handelsbanken Wealth & Asset Management portal. The top navigation bar includes the Handelsbanken logo, 'Wealth & Asset Management', and links for 'Go paperless', 'Relationship overview', and a home icon. A user dropdown menu shows 'Mr Z Smith' with a 'Go' button, a 'MENU' button, and a 'Logout' button. Below this is a dark blue navigation bar with tabs: 'Mr Z Smith', 'Account overview', 'Performance', 'My transactions and valuations', 'My reports' (highlighted with an orange box), and 'Investment updates'. Under the 'My reports' tab, there are four sub-tabs: 'Quarterly reports', 'Tax reports', 'Contract notes', and 'Key documents' (all highlighted with an orange box). The main content area is titled 'Quarterly reports' and features a table with columns for years (2022, 2021, 2020, 2019, Archive) and a 'Title' column. A row is highlighted with an orange box, showing 'Client Report, 2020-12-31, Mrs Z Smith' and the date '31 Dec 2020'. To the right of this row is a red 'PDF' button with a download icon. Below the table, there is a footer section with text: 'Further information on tax rates and allowances for the current tax year can be found [here](#). If you would like a hard copy version of this card to be sent to you please contact communications.hwam@handelsbanken.co.uk'.

Reports can be viewed and downloaded here

Accessing the strategy pages

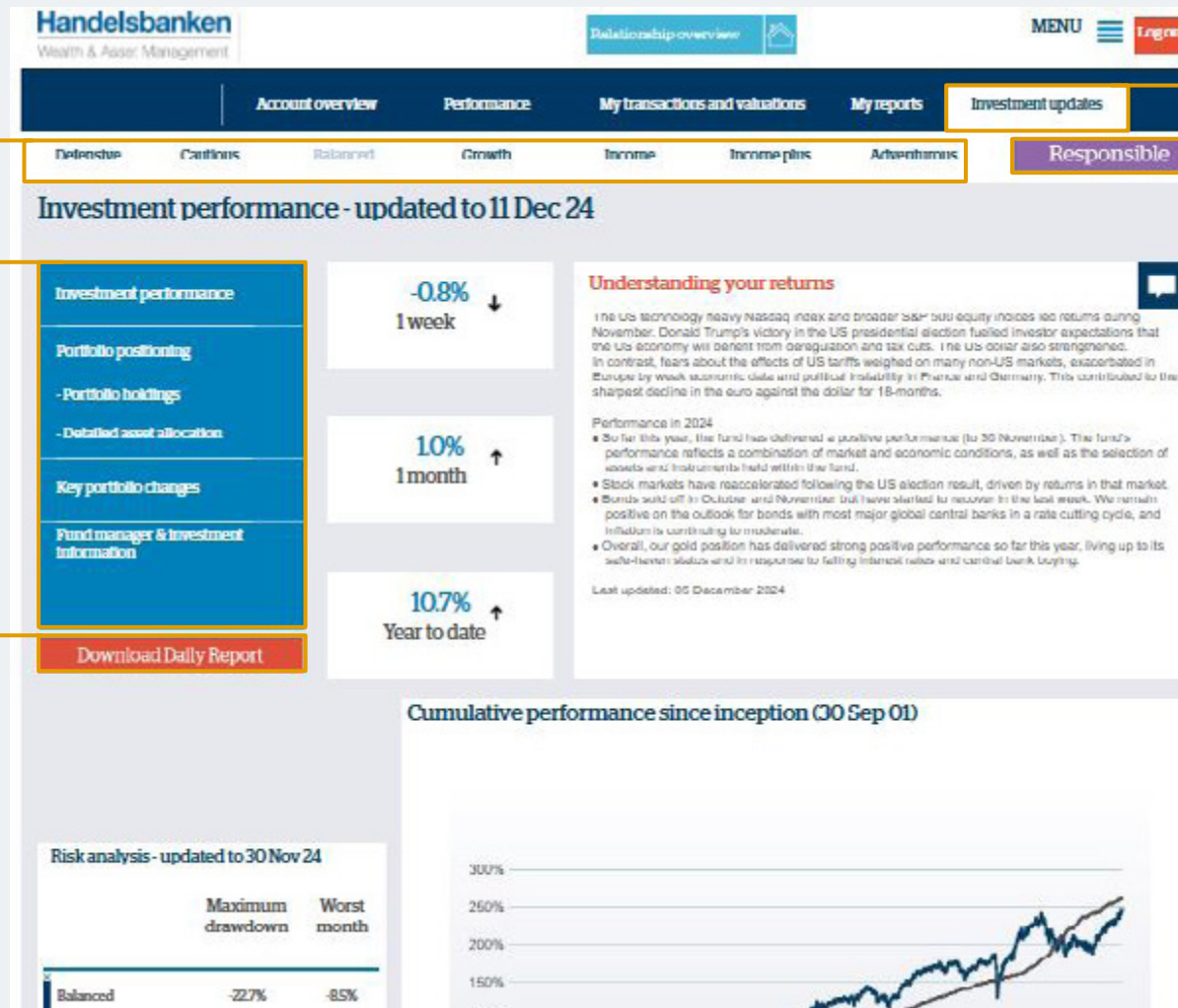
Select a **strategy** from the options here

You can view a wealth of information about **our strategies** from this menu

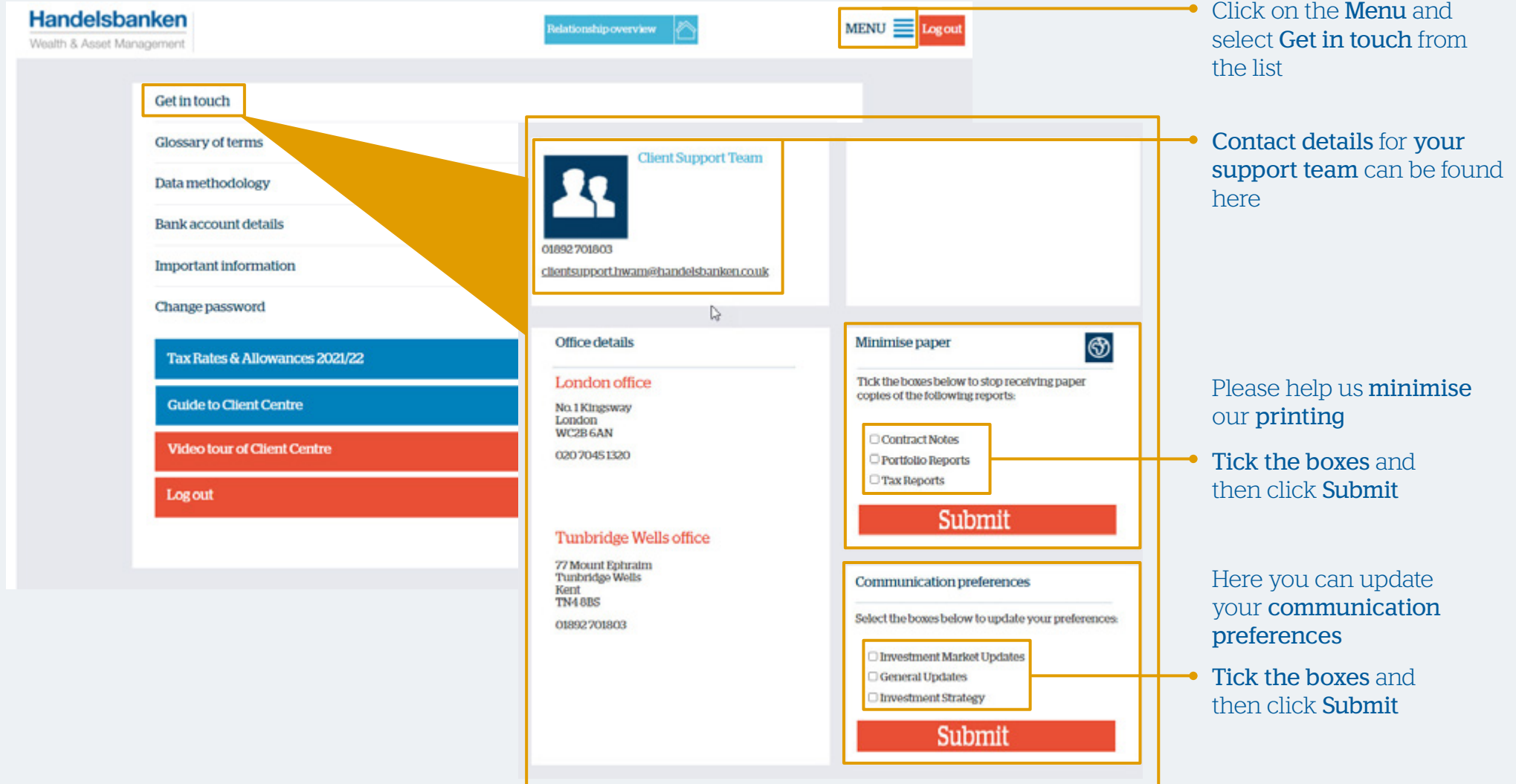
A succinct, **daily report** is available here

View other Handelsbanken strategies via the **Investment updates** tab

Access **responsible funds** here



Get in touch page



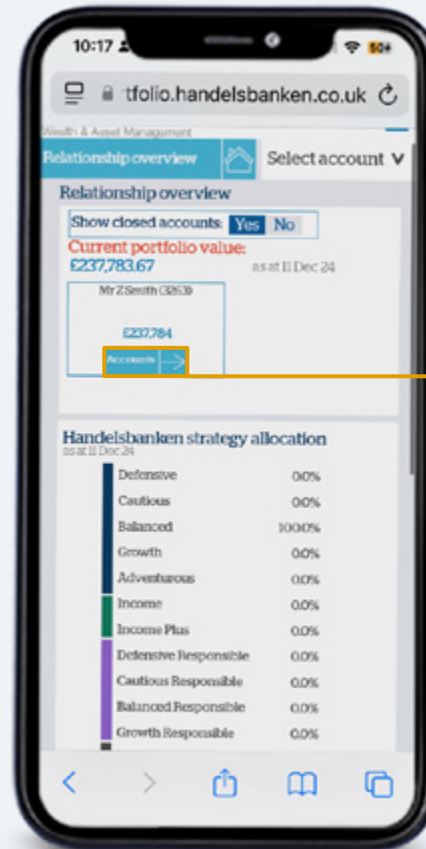
The screenshot shows the 'Get in touch' page of the Handelsbanken Wealth & Asset Management portal. The page is divided into several sections, with annotations highlighting key features:

- Menu:** A 'MENU' button is located in the top right corner, with a 'Log out' button next to it. An annotation points to the 'MENU' button, stating: 'Click on the **Menu** and select **Get in touch** from the list'.
- Get in touch sidebar:** A sidebar on the left contains a 'Get in touch' link, which is highlighted by an orange box and a yellow arrow pointing to the main content area. Other links in the sidebar include 'Glossary of terms', 'Data methodology', 'Bank account details', 'Important information', 'Change password', 'Tax Rates & Allowances 2021/22', 'Guide to Client Centre', 'Video tour of Client Centre', and 'Log out'.
- Client Support Team:** A section titled 'Client Support Team' features a profile picture of two people, the phone number '01892 701803', and the email address 'clientsupport.hwam@handelsbanken.co.uk'. An annotation points to this section, stating: 'Contact details for your **support team** can be found here'.
- Office details:** A section titled 'Office details' lists two offices: 'London office' (No. 1 Kingsway, London WC2B 6AN, 020 7045 1320) and 'Tunbridge Wells office' (77 Mount Ephraim, Tunbridge Wells Kent TN11 8BS, 01892 701803).
- Minimise paper:** A section titled 'Minimise paper' allows users to 'Tick the boxes below to stop receiving paper copies of the following reports:'. It includes checkboxes for 'Contract Notes', 'Portfolio Reports', and 'Tax Reports', followed by a red 'Submit' button. An annotation points to the checkboxes, stating: 'Please help us **minimise** our **printing**' and 'Tick the boxes and then click **Submit**'.
- Communication preferences:** A section titled 'Communication preferences' allows users to 'Select the boxes below to update your preferences:'. It includes checkboxes for 'Investment Market Updates', 'General Updates', and 'Investment Strategy', followed by a red 'Submit' button. An annotation points to the checkboxes, stating: 'Here you can update your **communication preferences**' and 'Tick the boxes and then click **Submit**'.

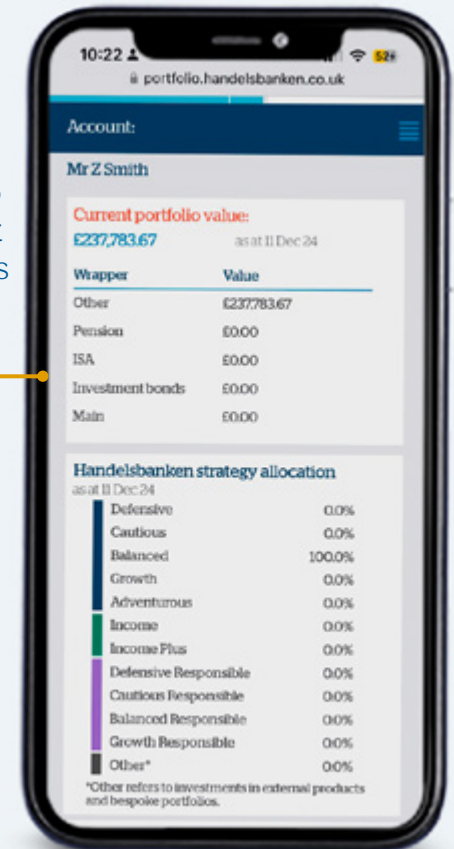
Mobile version

The mobile version of Client Centre is more condensed to provide succinct daily updates on investments

The **landing** page provides a high level summary of **relationship overview** and breakdown of **money in accounts**

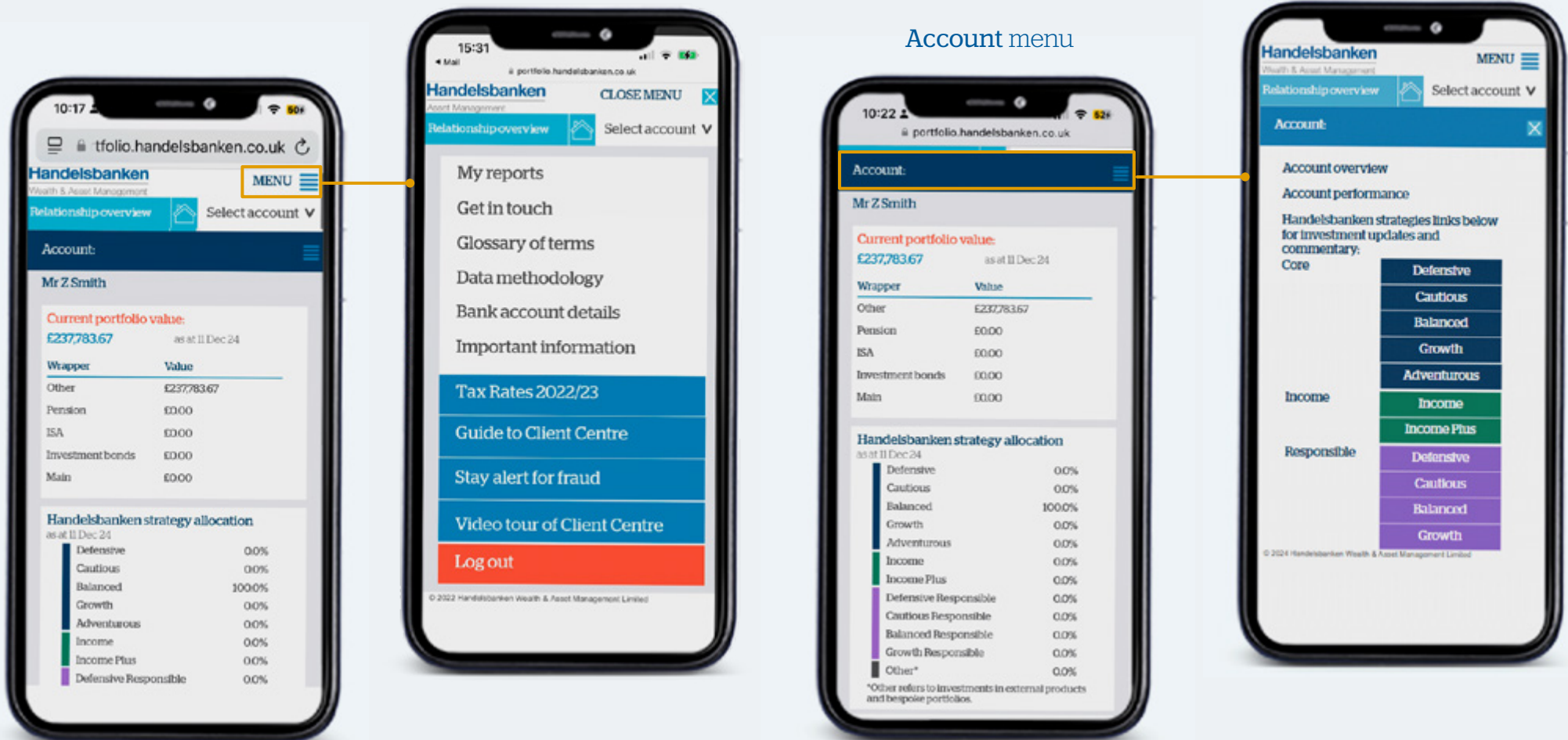


Click on the **Accounts** button to access the **account** level detailed pages



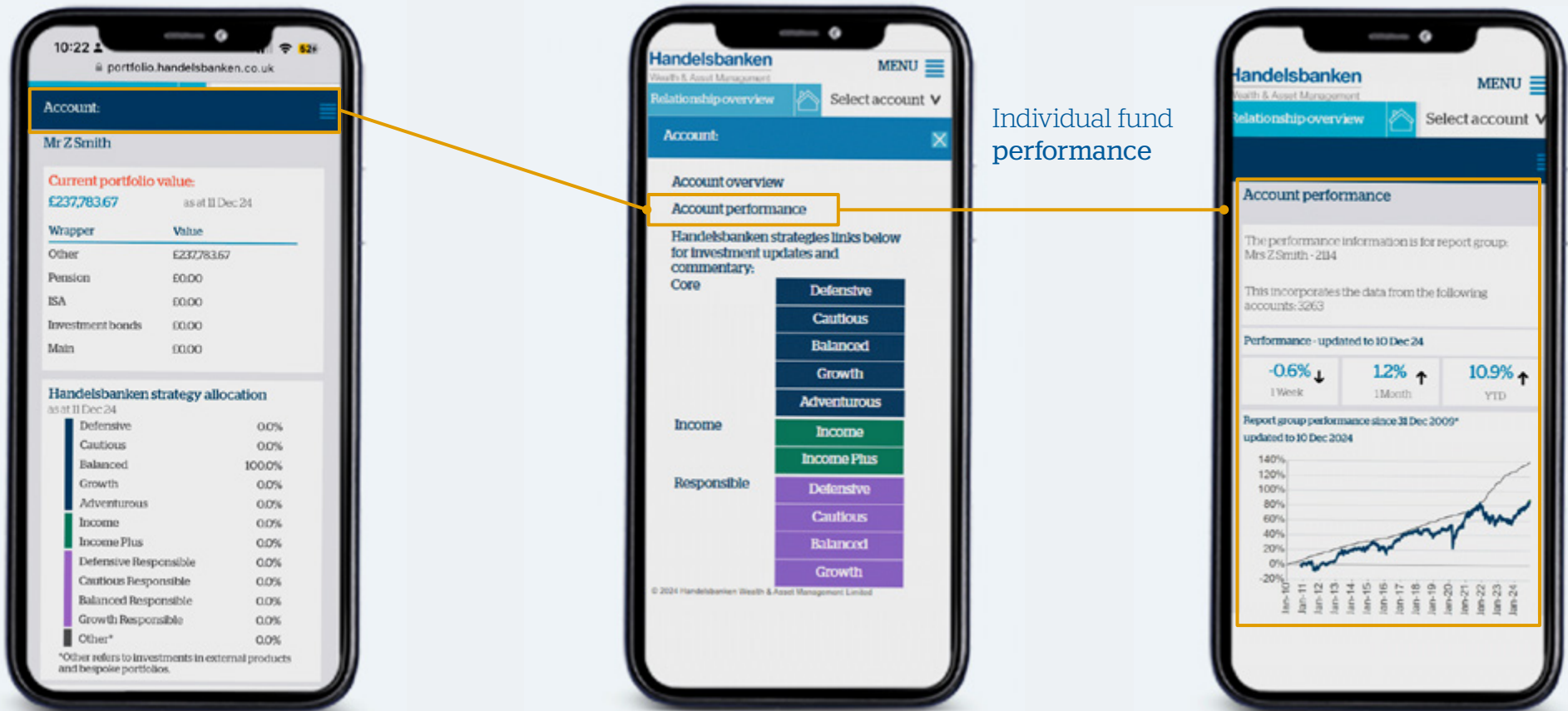
Mobile version - menus

Account menu



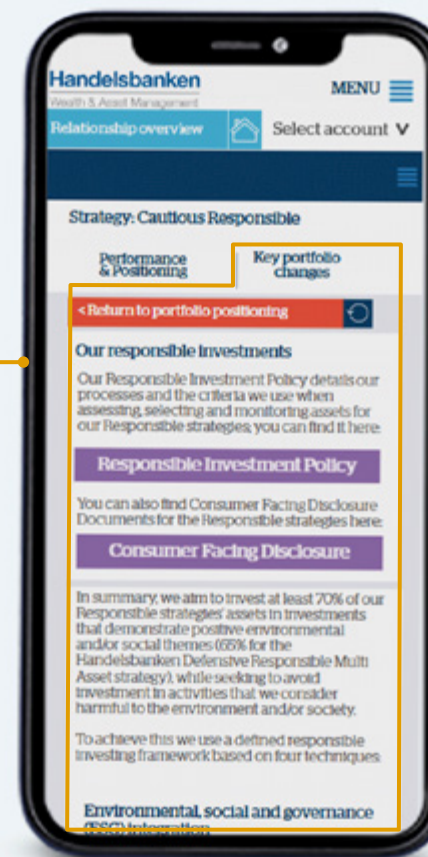
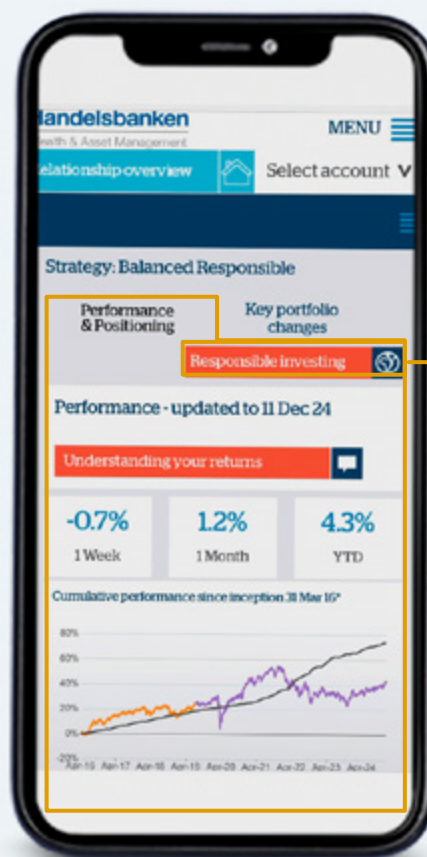
Mobile version - performance

Access performance information from the Account menu



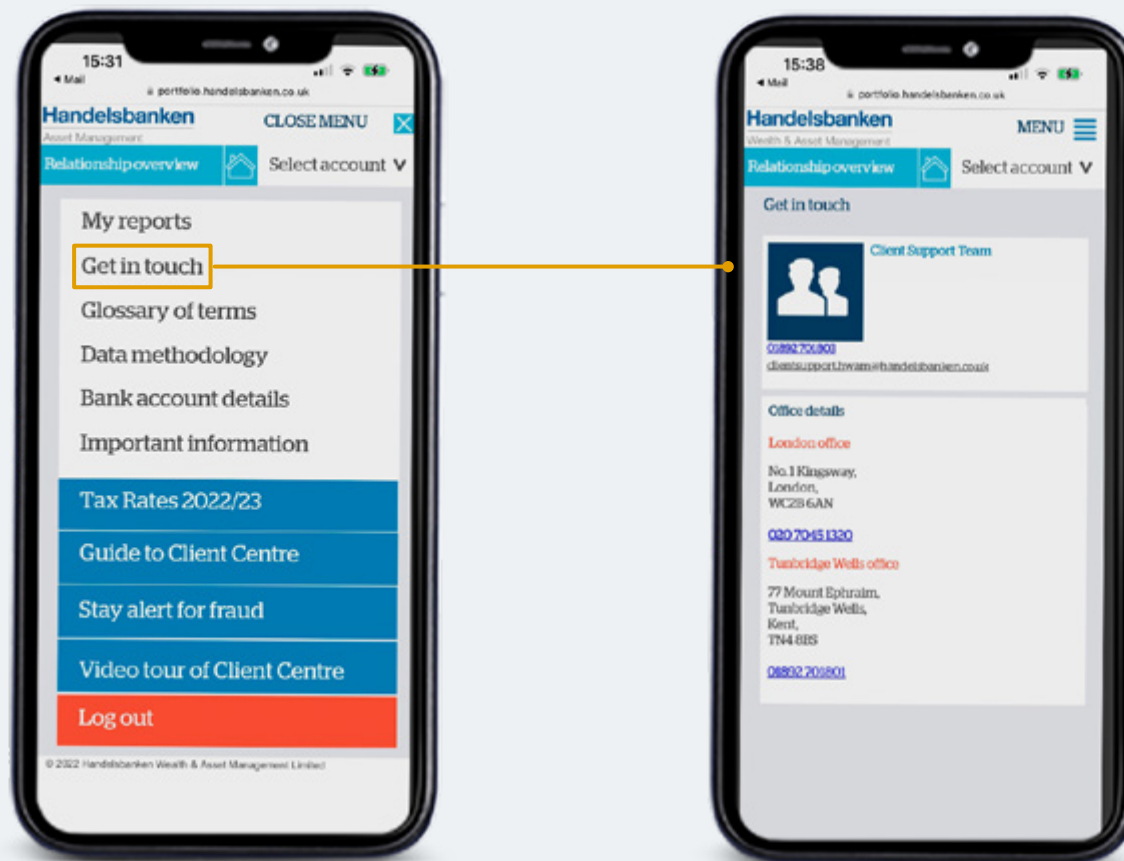
Mobile version - strategies

There are **shortcuts** to the **strategies** at the bottom of all the mobile pages



Mobile version - get in touch

Access the **Get in touch** information and your **relationship team** via the **main menu**



Important information

Handelsbanken Wealth & Asset Management Limited is authorised and regulated by the Financial Conduct Authority (FCA) in the conduct of investment business, and is a wholly owned subsidiary of Handelsbanken plc. Tax advice which does not contain any investment element is not regulated by the FCA.

Logging out

Once you have finished viewing all of your information, you can exit Client Centre by clicking on 'Logout' in the top right hand side of the page. You will be automatically logged out after a 20 minute period of inactivity.

Security

Security Client Centre is protected by a globally validated SSL Certificate (with 2048 bit encryption), complying with industry best practices regarding encryption levels. The site also benefits from new rules around password complexity. When access to the site is initially granted you will be provided with a temporary username and password, which on first login you will be asked to change. Once you have completed the process your password will be encrypted, and from this point onwards nobody at Handelsbanken or elsewhere will have access to the details.

Additional Information

If you require any further information please contact the Client Support Team by email at clientsupport.hwam@handelsbanken.co.uk or by telephone 01892 701803 or your usual contact. We will always try to respond to your communications promptly, and in any event within one business day. If we are continuing to work on your request then we will always contact you to confirm the position.

Registered Head Office: No.1 Kingsway, London, WC2B 6AN.

Registered in England Number: 4132340.

www.wealthandasset.handelsbanken.co.uk