

How to register and log in to the online Customer Centre

User Guide

You can view your Quilter accounts using our online Customer Centre.

This guide explains how to register and log in.



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The online Customer Centre is a service that helps you stay closer to your investments, enabling you to access valuations and correspondence online whenever you need to. It's quick and easy to register and login. You can also access your online account via the Quilter app, find out more at www.quilter.com/app

New to Quilter?

We do all we can to ensure everything runs smoothly when setting up your new account. This process can take up to 24 hours. Therefore when, as a new customer, you receive an email from us inviting you to register for the online Customer Centre (oCC), please leave it until the day after you receive that email to register for the oCC. This helps make sure your registration is set up correctly.

Want to register as a non-private customer?

if yes you will need to contact us so we can match up the registration to the correct account. We classify a non-private customer as anyone other than a private individual owning their own account. For example, this could be a corporate, trustee, power of attorney, or interested party. If that is the case please call us on 0808 171 2626 or email ask@quilter.com

Registration: our website

Registering for the online Customer Centre is a great way to stay up to date with your investments, enabling you to access valuations and correspondence online whenever you need to. The following steps outline how quick and easy it is to register and login.

*1. Go to platform.quilter.com/customer and click on **'Register'**.*

Alternatively search for 'Quilter'. Click on the main 'Quilter' link. Make sure you are on the 'Customer' tab at the top of the page. Then in the top right hand corner of the page click on the 'Log in' link.

Quilter

Need help? [Contact us](#)

Welcome to your Customer Centre

Username [I've forgotten](#)

NEXT

REGISTER

Register

You need to be registered to use the Customer Centre.

You will need identification to register - this can be a driving licence, passport or electricity bill.

REGISTER

1

[Terms of use](#) | [Privacy and cookie policy](#) | [Legal and regulatory](#) | [Accessibility](#) | [Terms & conditions](#) | [Contact us](#)

Registration: choose your registration route

1. If you have received a letter from us containing your registration codes, select, 'I have received a letter with two registration codes'.

If you haven't received a letter from us select, 'I have NOT received any registration code letter'.

2. Select 'Next'.

If you have received a letter with your registration codes, follow the steps from page 5 to complete your registration (Registration route 1).

If you haven't received a letter with registration codes, follow the steps from page 12 to complete your registration (Registration route 2).

Quilter

Need help? Contact us

Account registration

▼ Step 1 of 5 — 1. Get started

Hello

To help us with your registration, please answer the following question:

1 I have received a letter with two registration codes I have NOT received any registration code letter

2 **NEXT**

Progress

1. Get started
2. Unlock your account
3. Set username and password
4. Verify your email and mobile number
5. Extra security

Need help?
Contact us

Registration route 1: accept the terms

1. Click to view our online terms and conditions which explain how our online services work.

2. Select the button to 'accept the terms and conditions', and move to the next step.

Quilter Need help? [Contact us](#)

Account registration

▼ Step 2 of 5 — 2. Unlock your account

Quilter Terms of Use.

In order to continue you will need to accept Quilter's Online Service Agreement.

1 [View terms and conditions](#)

To register

You will need:

- your letter from Quilter inviting you to register for the app.
- your National Insurance number. (If we do not have your National Insurance number, we will ask for your account number.)

ACCEPT TERMS AND CONDITIONS

Progress

1. Get started
- 2. Unlock your account**
3. Set username and password
4. Verify your email and mobile number
5. Extra security

Need help?
[Contact us](#)

Registration route 1: unlock your account

Before you start: have the letter you received from us containing your unlock codes and your national insurance number, or Quilter account number, to hand.

1. Enter part one of your Unlock Code

2. Enter part two of your Unlock Code

3. Select 'Next'

The screenshot shows the Quilter account registration interface. At the top left is the Quilter logo, and at the top right is a link for "Need help? Contact us". The main heading is "Account registration" with a sub-heading "Step 2 of 5 — 2. Unlock your account". Below this, the text reads "Excellent! You have received a letter from us inviting you to register for the app. The letter contains a unique code in two parts." The interface is divided into three main sections:

- Step 1:** "Please enter the first code" with five input boxes containing the numbers 1, 2, 3, 4, and 5.
- Step 2:** "Please enter the second code" with five input boxes containing the letters A, B, C, D, and E.
- Step 3:** A dark red "NEXT" button.

On the right side, there is a "Progress" section with five steps:

1. Get started (checked)
2. Unlock your account (highlighted in green)
3. Set username and password
4. Verify your email and mobile number
5. Extra security

At the bottom right, there is another "Need help? Contact us" link.

Registration route 1: verify your identity

1. To help verify your identity, enter your national insurance number, in the format AB123456A, with no spaces and all capital letters.

If we don't hold a national insurance number on record for you, we will ask you to enter your Quilter account number instead.

2. Select 'Next'.

Quilter

Need help? [Contact us](#)

Account registration

Step 2 of 5 — 2. Unlock your account

1 Now please enter your National Insurance number

AB123456A

2 NEXT

Progress

- 1. Get started
- 2. Unlock your account
- 3. Set username and password
- 4. Verify your email and mobile number
- 5. Extra security

Need help?
[Contact us](#)

Registration route 1: set your username and password

1. Create your username, which must contain at least six characters.

2. Create and confirm your password.
Your password must contain at least one lowercase letter, one uppercase letter, one number and be at least 8 characters long.*

3. Select 'Next'.

* Please try and pick a strong password.
Using passwords like Password1 or Monkey01 may be rejected as being too weak.

The screenshot shows the Quilter account registration page. The header includes the Quilter logo and a 'Need help? Contact us' link. The main heading is 'Account registration' with a sub-heading 'Step 3 of 5 — 3. Set username and password'. The page is divided into three main sections: 'Create your username', 'Create your password', and 'Progress'. The 'Create your username' section has a text input field containing 'Pebbles2' and a note that the username must be at least six characters long. The 'Create your password' section has two text input fields, one for 'New password' and one for 'Confirm new password', both containing masked characters. A list of password requirements is shown: at least one lowercase letter, one uppercase letter, one number, and at least 8 characters. The 'Progress' section on the right shows five steps: 1. Get started (checked), 2. Unlock your account (checked), 3. Set username and password (active), 4. Verify your email and mobile number (unchecked), and 5. Extra security (unchecked). A 'Need help? Contact us' link is also present at the bottom right. A 'NEXT' button is located at the bottom of the form.

Quilter

Need help? [Contact us](#)

Account registration

Step 3 of 5 — 3. Set username and password

Create your username

Your username must contain at least six characters

1 Username

Pebbles2

Create your password

Your password must contain:

- ✓ at least one lowercase letter
- ✓ at least one uppercase letter
- ✓ at least one number
- ✓ at least 8 characters

2 New password

Confirm new password

3 NEXT

Progress

- ✓ 1. Get started
- ✓ 2. Unlock your account
- 3. Set username and password
- 4. Verify your email and mobile number
- 5. Extra security

Need help? [Contact us](#)

Registration route 1: verify your email address

1. Enter and confirm your email address

If you have used an email address for your username, we will default to that, however you can overwrite this.

Quilter

Need help? [Contact us](#)

Account registration

▼ Step 4 of 5 — 4. Verify your email and mobile number

Please enter your email address for us to validate.

If you have used an email address for your username we will default to that, however you can overwrite this.

Email address

Email address

Confirm email address

NEXT

Progress

- 1. Get started
- 2. Unlock your account
- 3. Set username and password
- 4. Verify your email and mobile number

2. Select 'Next'.

3. Enter the code we emailed to your email address.*

4. Select 'Next'.

Quilter

Need help? [Contact us](#)

Account registration

▼ Step 4 of 5 — 4. Verify your email and mobile number

Please enter the code we have just emailed you at:

vanessa.jensen@quilter.com [EDIT](#)

6 3 0 8 6 0

NEXT RESEND

Progress

- 1. Get started
- 2. Unlock your account
- 3. Set username and password
- 4. Verify your email and mobile number
- 5. Extra security

* If you do not receive the email within a few minutes please check your junk/spam folder.

Registration route 1: verify your mobile number

1. Enter your mobile number for us to validate.

2. Select 'Next'.

3. Enter the code we have sent to your mobile number.

4. Select 'Next'.

Quilter Need help? Contact us

Account registration

Step 4 of 5 — 4. Verify your email and mobile number

Please enter a mobile phone for us to validate
Please enter a mobile phone number for us to validate

Mobile number

UK (+44) 7595609972

NEXT

Progress

- 1. Get started
- 2. Unlock your account
- 3. Set username and password
- 4. Verify your email and mobile number

Quilter Need help? Contact us

Account registration

Step 4 of 5 — 4. Verify your email and mobile number

Please enter the code we have sent you on:

+447595609972 EDIT

8 7 2 1 8 9

NEXT RESEND

Progress

- 1. Get started
- 2. Unlock your account
- 3. Set username and password
- 4. Verify your email and mobile number
- 5. Extra security

Registration route 1: choosing a memorable picture and phrase

1. As an extra security measure to help keep you safe each time you log in, we'll show you a memorable picture and phrase to prove you are on our online service before you access your account. You can use the picture and phrase provided or pick your own.

2. Select 'Next'.


Need help? [Contact us](#)

Account registration

▼ Step 5 of 5 — 5. Extra security

Your security is really important to us.
As an extra security measure to help keep you safe each time you log in, we'll show you a memorable picture and phrase to prove you're on our platform before you enter your password.
You can use the picture and phrase we've provided or pick your own. [Learn more](#)

Memorable picture



[Pick my own](#)

Memorable phrase

Candle shipping enforcement

[Pick my own](#)

Progress

- 1. Get started
- 2. Unlock your account
- 3. Set username and password
- 4. Verify your email and mobile number
- 5. Extra security

Need help?

[Contact us](#)

NEXT

1

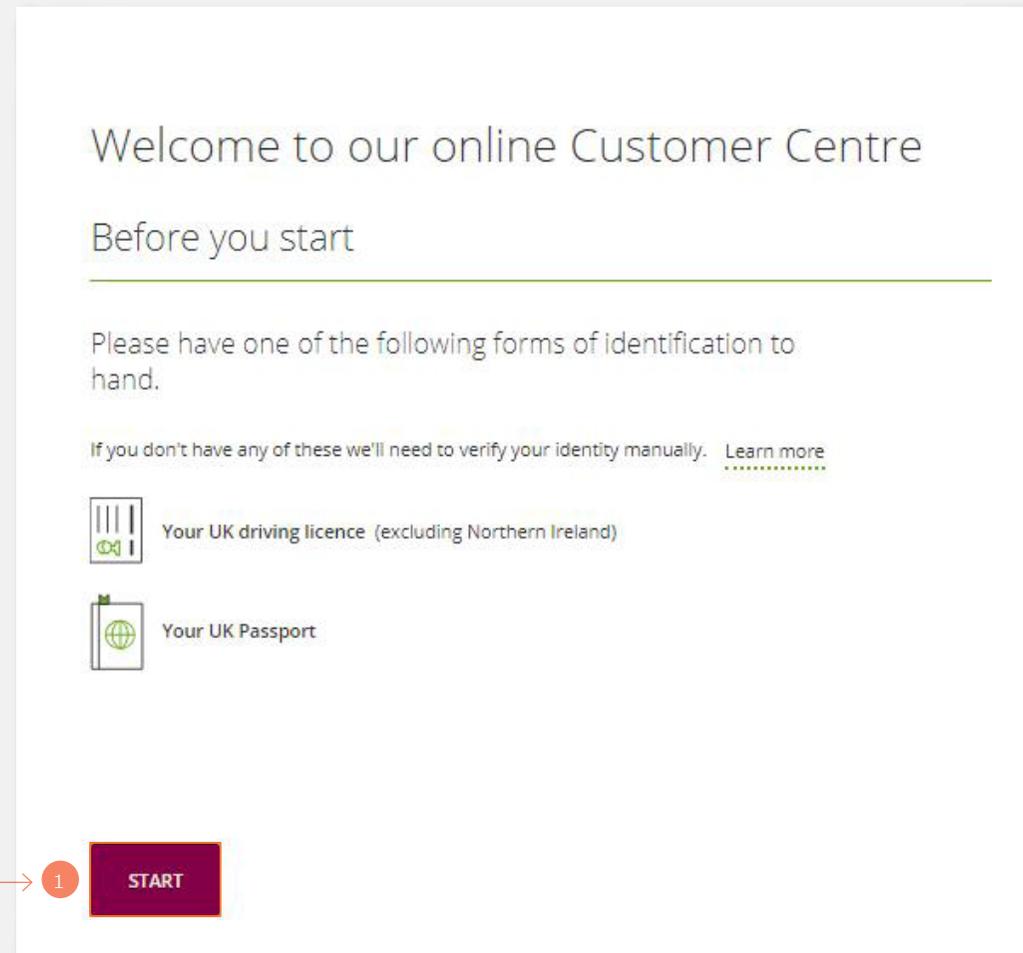
2

Registration route 2: starting the registration process

If you did not receive unlock codes please follow this process to complete your registration.

1. Select the **'Start'** button.

You just need one of the following forms of identification to hand, your driving license, passport.



Welcome to our online Customer Centre

Before you start

Please have one of the following forms of identification to hand.

If you don't have any of these we'll need to verify your identity manually. [Learn more](#)

-  Your UK driving licence (excluding Northern Ireland)
-  Your UK Passport

1 **START**

Registration route 2: your details

1. Enter your name and date of birth.

2. Enter your postcode and select **'Find address'**, or enter your address manually.

3. Enter your phone contact details.

Top Tip:

We strongly advise using your mobile number for your contact details, there may be occasions where we need to send you a code to your phone, which is a much easier experience on a mobile.

4. Enter your email address.

Top Tip:

We recommend you use the same name format and spelling you have used on your investments.

5. Select **'Next'**.

Account registration
 ✓ Step 1 of 5 — Personal details

Personal details

First name

Surname

Date of birth
 Date Month Year

Address details

Address details

[+ Or manually enter address](#)

Please note that we can only accept your residential address. Please don't enter a 'care of address', a PO Box or your financial adviser's address.

Phone number

For your security during your registration, we will send a registration code to your phone which you'll then need to enter later in this process.

Mobile phone number

Email address

Email address

Confirm email address

Progress

- Personal details
- Verification of identity
- Username & password
- Extra security
- Activate your account

Need help?
[Contact us](#)

1 **2** **3** **4** **5** **6** **NEXT**

Registration route 2: username and password

1. Create your username which must contain at least six characters.

2. Create your password which must contain at least one lowercase letter, one uppercase letter, one number and be at least 8 characters long.*

3. Select **'Next'**

* Please try and pick a strong password.
Using passwords like Password1 or Monkey01 may be rejected as being too weak.

Account registration

Step 3 of 5 — Username & password

Cancel

Previous

Create your username

Your username must contain at least six characters

Username

Pebbles2

Create your password

Your password must contain:

- ✓ at least one lowercase letter
- ✓ at least one uppercase letter
- ✓ at least one number
- ✓ at least 8 characters

New password

Confirm new password

Next

Progress

- ✓ Personal details
- ✓ Verification of identity
- Username & password
- Extra security
- Activate your account

Need help?

Contact us

Registration route 2: memorable picture and phrase

1. As an extra security measure to help keep you safe each time you log in, we'll show you a memorable picture and phrase to prove you are on our online service before you access your account. You can use the picture and phrase we've provided or pick your own.

2. Select **'Next'**.

Account registration
 Step 4 of 5 — Extra security

Your security is really important to us.
 As an extra security measure to help keep you safe each time you log in, we'll show you a memorable picture and phrase to prove you're on our platform before you enter your password.
 You can use the picture and phrase we've provided or pick your own. [Learn more](#)

Memorable picture

1 
 Pick my own

Memorable phrase

Consequence alot list
 Pick my own

Progress

- Personal details
- Verification of identity
- Username & password
- Extra security**
- Activate your account

Need help?
[Contact us](#)

2 **NEXT**

Registration route 2: activation email

1. We will send an activation email to the email address you provided when you registered with us.

2. At the same time we will send a registration code to the phone number you have registered with us.

3. Please click on the link in the email to activate your account.*
A registration page displaying the memorable picture and phrase you have chosen will open.

* If you do not receive the email within a few minutes please check your junk/spam folder.

Thank you for your information

1

We've sent an activation email to 1@1.com. Please click the link in this email to activate your account.

Need help?
Contact us
.....

When you click the link, a registration page displaying your memorable picture and phrase will open. At the same time, we'll send a registration code to your phone

*****456

You'll need to enter this code and then you should be all set. If we need to check anything else with you then we'll let you know.

BACK TO OUR WEBSITE

from: no-reply@platform.quilter.com <no-reply@platform.quilter.com>
 Sent: 08 December 2021 10:58
 To: Wong, Darren <Darren.Wong@quilter.com>
 Subject: Customer Centre - Account Activation

Dear Pabbles
 Username: Pabbles4
 Thank you for registering to use the Quilter online Customer Centre.
 Please click [here](#) to complete your registration and activate your account.
 If you have not registered to use our Customer Centre, please contact us on Freephone 0800 171 2020 or email us at enb@quilter.com

Anthony Scammell
 UK Operations Director
 Please do not reply to this email. It is an automatic notification and the address is not monitored for incoming messages.

T: 0800 171 2020
E: enb@quilter.com
W: platform.quilter.com

The content of this email and any attachments is confidential wherever it is sent. If you are not the named addressee, you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake. Do not disclose the contents of this e-mail to anyone other than those named. If you are the named addressee you should not disseminate, distribute or copy this e-mail. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. If you are not the named addressee you should not disseminate, distribute or copy this e-mail.

Registration route 2: verification code

1. Your memorable picture and phrase will be displayed so you know that it is us. Enter the verification code we have sent to your phone and click **'Confirm'**.
2. If you did not get a code you can click here to request a new one. It may take up to 30 seconds for the code to come through.
3. Once you click confirm you have completed the registration process. If in the unlikely event you have any problems and you cannot complete the registration process please call us on **0808 171 2626**.

The screenshot shows the 'Account registration' page for Quilter. At the top, there is a 'Cancel' button with a green 'X' icon. The main heading is 'Account registration'. Below this, there is a section titled 'Your memorable picture and phrase' which includes an image of bowling pins and a green box with the text 'I'm on strike!'. The main text states: 'Your email has been verified. We have just sent you an authorisation code via SMS to ****199'. Below this, it says 'Please enter the code below and click 'Next''. There are three numbered steps indicated by red circles and arrows: 1. A text input field for the code. 2. A button labeled 'Didn't get a code?'. 3. A purple 'CONFIRM' button. On the right side, there is a 'Progress' section with a list of steps: 'Personal details', 'Verification of identity', 'Username & password', 'Extra security', and 'Activate your account' (which is highlighted with a green checkmark and a location pin icon). At the bottom right, there is a 'Need help?' section with a 'Contact us' link.

Registration route 2: accept online terms when you first log in

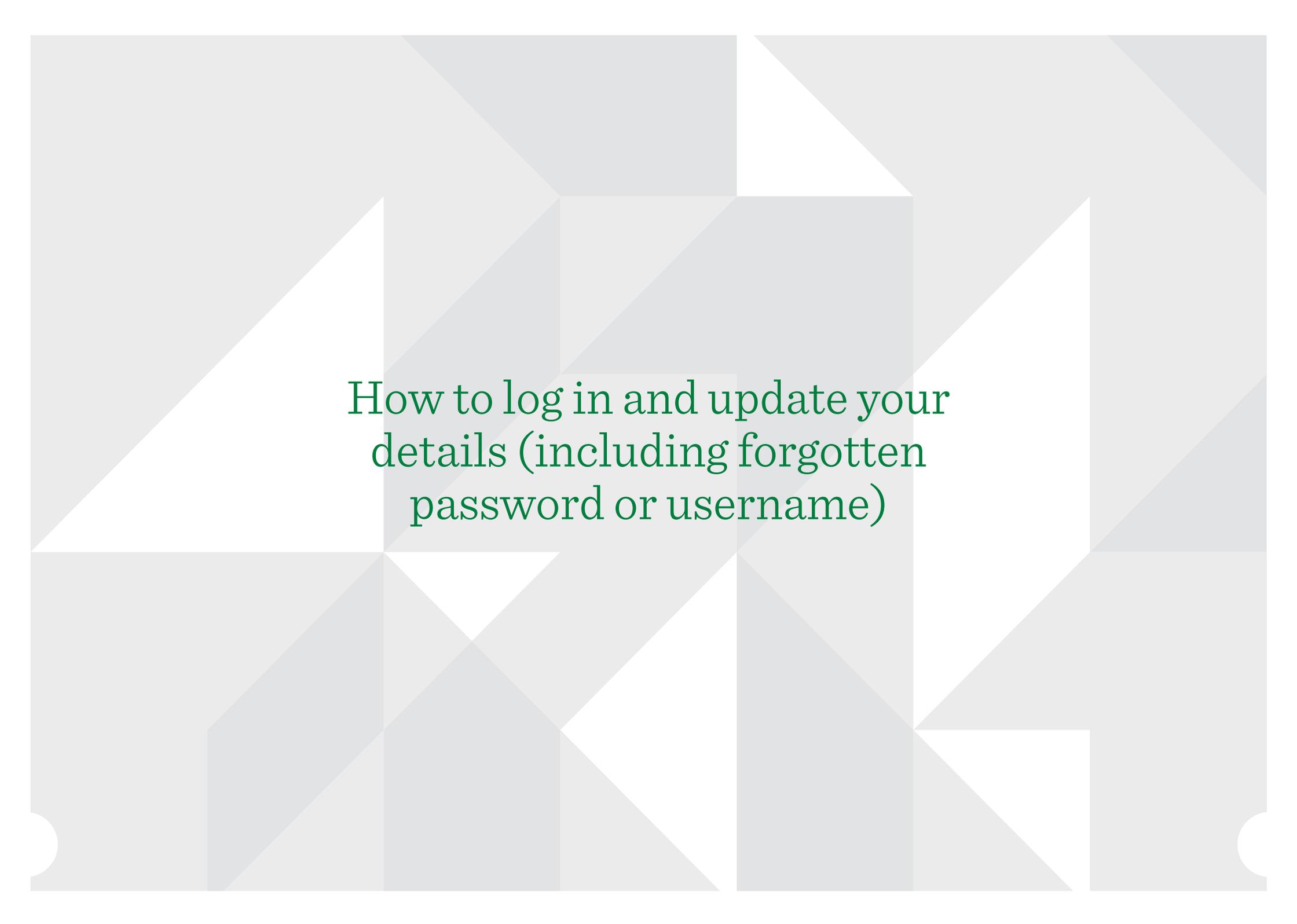
1. Click to view our 'Customer online terms and conditions' which explain how our online services work.

2. Tick the box to confirm you have read the terms and conditions.

3. Select 'Continue' to log in.

The screenshot shows the Quilter website's 'Terms and conditions' page. At the top, the Quilter logo is displayed. Below the logo, the title 'Terms and conditions' is centered. A message states: 'Our terms and conditions have changed and we need you to accept them before you can access the Customer Centre.' Below this message, there are three numbered steps indicated by red circles and arrows from the left:

- Step 1: A link labeled 'Customer Online Terms and Conditions' with a document icon and the text 'Last updated: 01/03/2019 12:00' is highlighted with an orange box.
- Step 2: A green box containing a checkbox and the text 'I confirm I have read the terms and conditions for Quilter's Online Customer Centre and I agree to be bound by them.' The checkbox is currently unchecked.
- Step 3: Two buttons are shown: a dark red 'CONTINUE' button and a white 'LOG OUT' button with a dark border.



How to log in and update your
details (including forgotten
password or username)

My accounts page: log in

1. Once you have completed the registration process, to log in to your online account, go to our website, platform.quilter.com/customer and enter your username.

2. The memorable picture and phrase you registered will be displayed. Enter your password and click '**login**' to log in. You may be asked to accept our updated Terms and Conditions before continuing to the online Customer Centre.

1

2

3

Username I've forgotten

Pebbles3

NEXT

2

Your memorable picture and phrase



I'm no mug.

You're logging in as **Pebbles3** CHANGE

3

Password I've forgotten

LOGIN

I have forgotten my username

1. If you have forgotten your username when logging in, then click the **'I've forgotten'** link on the Customer Centre logon page

Quilter Need help? [Contact us](#)

Welcome to your Customer Centre

Username [I've forgotten](#)

1

Register

You need to be registered to use the Customer Centre.

You will need identification to register - this can be a driving licence, passport or electricity bill.

2. When the forgotten username screen comes up, enter your registered email address in the box then press **'continue'**.

Quilter Need help? [Contact us](#)

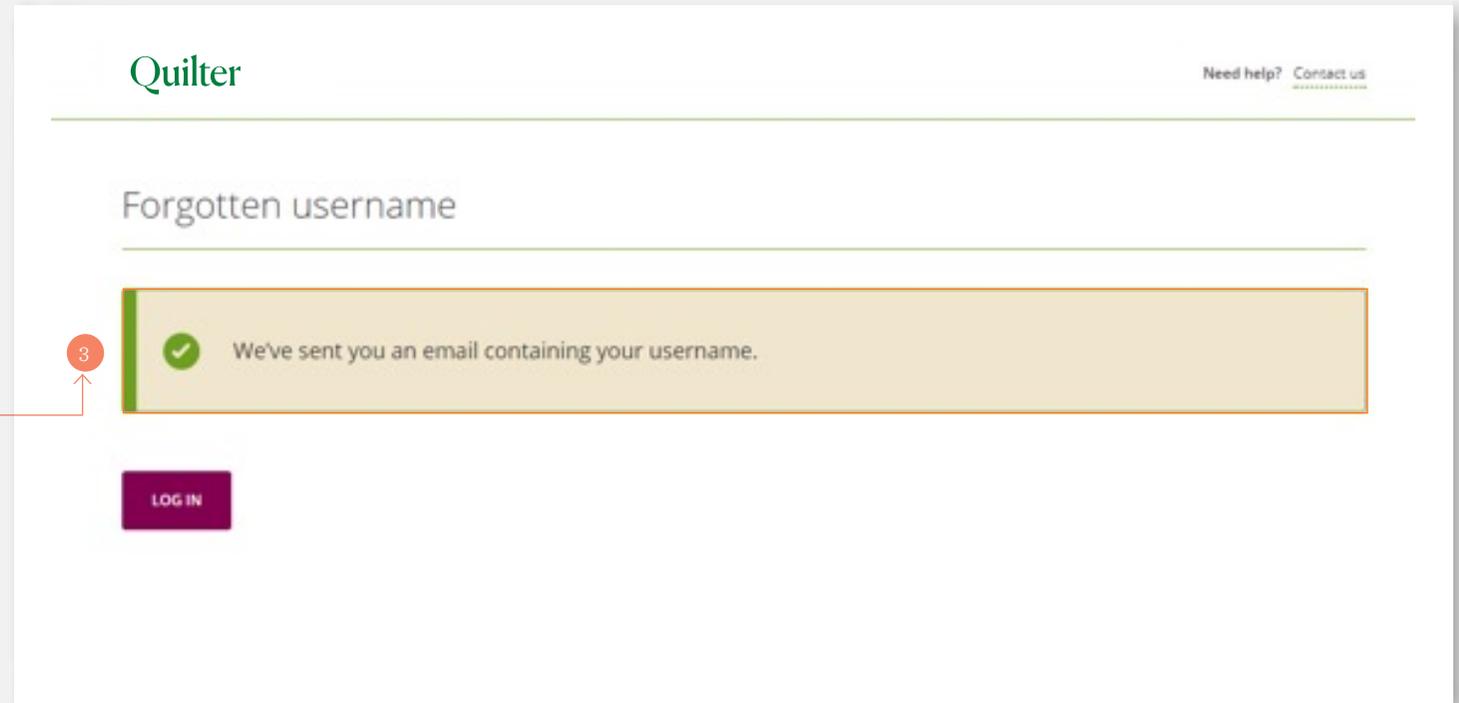
Forgotten username

Please enter your email address

2

I have forgotten my username

3. We will email you your username and you will see the confirmation message. Once you have the email with your username, log in by clicking the **'log in'** button.



I have forgotten my password

1. Enter your username in the **'Username'** field, then select **'Next'**

Quilter Need help? [Contact us](#)

Welcome to your Customer Centre

Username [I've forgotten](#)

username

NEXT

Register

You need to be registered to use the Customer Centre. You will need identification to register - this can be a driving licence, passport or electricity bill.

REGISTER

2. On the enter password screen select the **'I've forgotten'** link.

Quilter Need help? [Contact us](#)

Enter password

Your memorable picture and phrase

 Dated consider

You're logging in as CHANGE

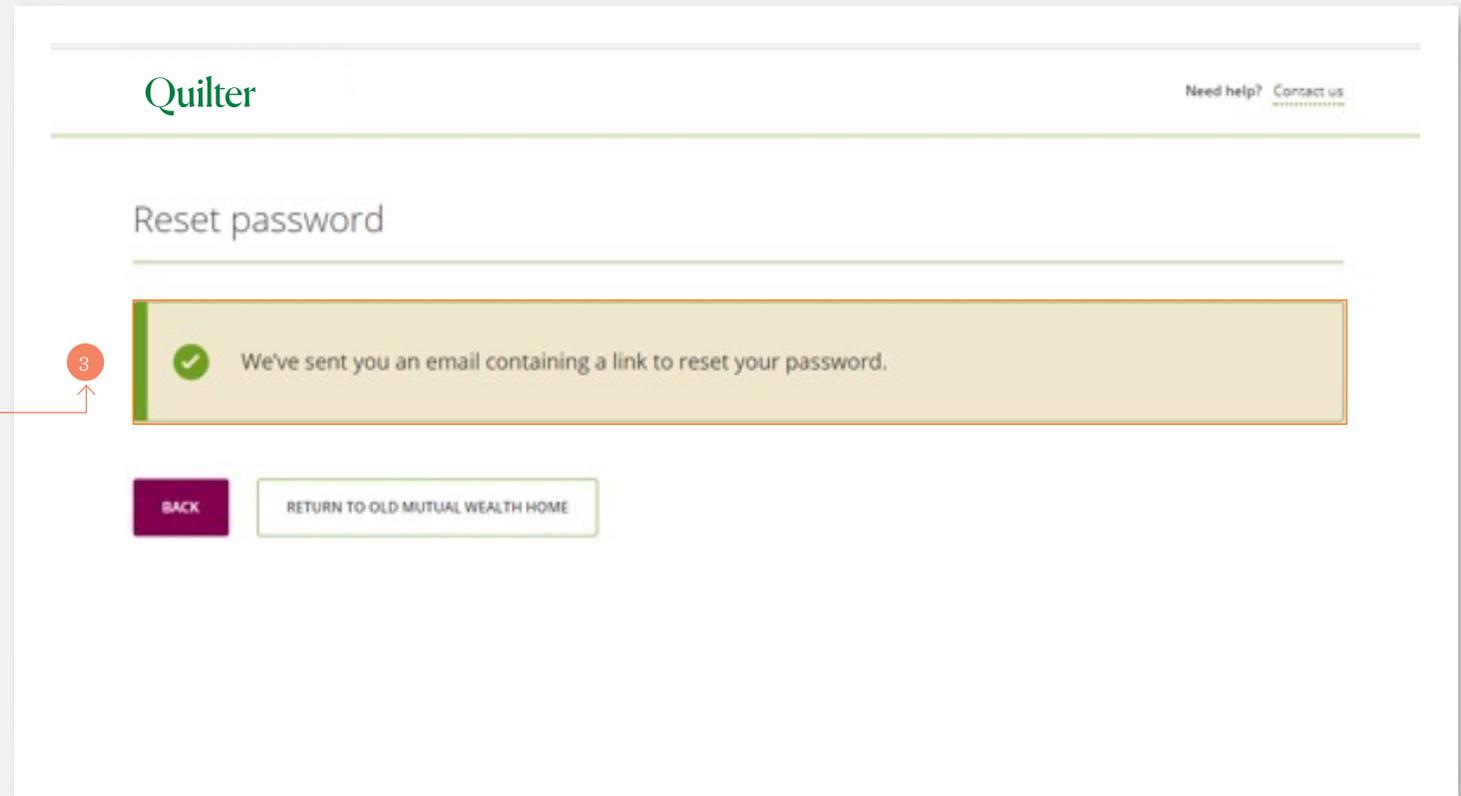
Password [I've forgotten](#)

Enter your password

LOGIN

I have forgotten my password

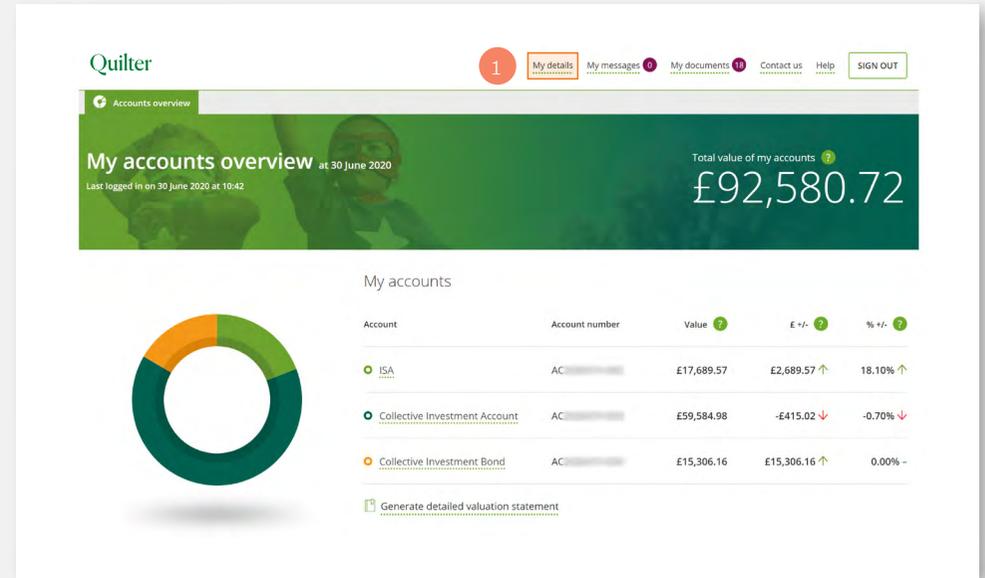
3. You will receive a message to confirm that an email has been sent to your registered email address. You will need to click on the link in the email once you've received it and then reset your password.



Updating security, personal details and correspondence preferences

You can update your security and address details as well as your correspondence preference details using the 'My details' ⁽¹⁾ option at the top of the account overview page.

- **Security details** ⁽²⁾ – this allows you to update your email address as well as your password and security details.
- **Residential address** ⁽³⁾ – this shows your current residential address and can be amended using the update button on the right.
- **Correspondence address** ⁽⁴⁾ – this shows the address we use for correspondence and can be updated like your residential address using the update button. This shows whether it is the same as your residential address.
- **Correspondence preference** ⁽⁵⁾ – you can choose to receive correspondence online only, or online and by post. Certain regulatory documents will always be sent by post. Your current preference is displayed on the screen and can be changed using the 'Update correspondence preference' button on the right.



Quilter

Accounts overview

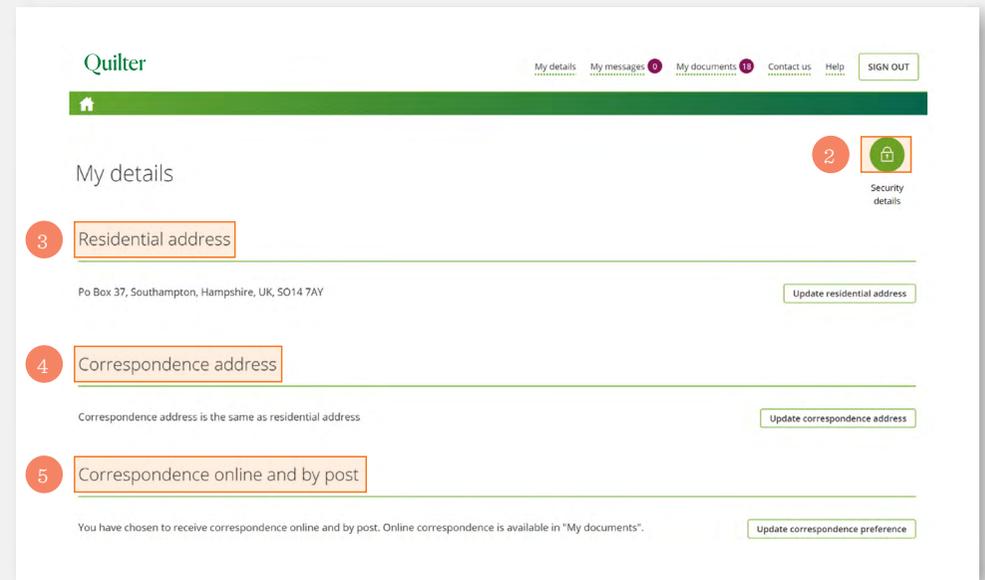
My accounts overview at 30 June 2020
Last logged in on 30 June 2020 at 10:42

Total value of my accounts
£92,580.72

My accounts

Account	Account number	Value	£ +/-	% +/-
ISA	AC	£17,689.57	£2,689.57 ↑	18.10% ↑
Collective Investment Account	AC	£59,584.98	£415.02 ↓	-0.70% ↓
Collective Investment Bond	AC	£15,306.16	£15,306.16 ↑	0.00% -

Generate detailed valuation statement



Quilter

My details

Residential address

Po Box 37, Southampton, Hampshire, UK, SO14 7AY

Update residential address

Correspondence address

Correspondence address is the same as residential address

Update correspondence address

Correspondence online and by post

You have chosen to receive correspondence online and by post. Online correspondence is available in "My documents".

Update correspondence preference

quilter.com

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively.

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