

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.



Contents

How to register

Our website **3**

Choose your registration route **3**

Registration route 1

Route 1: accept the terms **5**

Route 1: unlock your account **6**

Route 1: verify your identity **7**

Route 1: set your username and password **8**

Route 1: verify your email address **9**

Route 1: verify your mobile number **10**

Route 1: choosing a memorable picture and phrase **11**

Registration route 2

Route 2: starting the registration process **12**

Route 2: your details **13**

Route 2: verify your identity **14**

Route 2: username and password **15**

Route 2: memorable picture and phrase **16**

Route 2: activation email **17**

Route 2: verification code **18**

Route 2: accept online terms when you first log in **19**

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

Log in **21**

Forgotten username **22**

Forgotten password **24**

Updating security, personal details and correspondence preferences **26**

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

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).

The screenshot shows the Quilter Account registration page. 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 1 of 5 — 1. Get started'. Below this, it says 'Hello' and 'To help us with your registration, please answer the following question:'. There are two radio button options: 'I have received a letter with two registration codes' (which is selected and highlighted with a red box and a red circle containing the number 1) and 'I have NOT received any registration code letter'. Below the options is a red 'NEXT' button, highlighted with a red box and a red circle containing the number 2. On the right side, there is a 'Progress' section with five steps: 1. Get started (highlighted in green), 2. Unlock your account, 3. Set username and password, 4. Verify your email and mobile number, and 5. Extra security. At the bottom right, there is another 'Need help? Contact us' link.

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.)

2 [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 first input field is labeled "Please enter the first code" and contains five numeric boxes (1-5). The second input field is labeled "Please enter the second code" and contains five alphabetic boxes (A-E). A "NEXT" button is located below the second field. On the right side, a "Progress" section shows five steps: 1. Get started (checked), 2. Unlock your account (highlighted), 3. Set username and password, 4. Verify your email and mobile number, and 5. Extra security. At the bottom right, there is another "Need help? Contact us" link.

Quilter

Need help? [Contact us](#)

Account registration

Step 2 of 5 — 2. Unlock your account

Excellent!

You have received a letter from us inviting you to register for the app. The letter contains a unique code in two parts.

1 Please enter the first code

2 Please enter the second code

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 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 page title is "Account registration" and the current step is "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".

Create your username: A text input field contains "Pebbles2". A red circle with the number "1" is next to the field, and an arrow points from the first instruction to it. Below the field, it says "Your username must contain at least six characters".

Create your password: A "New password" field contains "*****" and a "Confirm new password" field also contains "*****". A red circle with the number "2" is next to the "New password" field, and an arrow points from the second instruction to it. Below the fields, it says "Your password must contain:" followed by four requirements, each with a green checkmark: "at least one lowercase letter", "at least one uppercase letter", "at least one number", and "at least 8 characters".

Progress: A vertical list of five steps. Step 1 "1. Get started" and Step 2 "2. Unlock your account" are completed with green checkmarks. Step 3 "3. Set username and password" is the current step, highlighted in green with a location pin icon. Step 4 "4. Verify your email and mobile number" and Step 5 "5. Extra security" are not yet completed, indicated by empty circles.

Need help?: A link "Contact us" is visible at the bottom right of the page.

Next: A red "NEXT" button is located at the bottom of the form. A red circle with the number "3" is next to the button, and an arrow points from the third instruction to it.

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

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

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'.

The screenshot shows the Quilter account registration page at Step 5 of 5, titled "Extra security". The page explains that for extra security, users will be shown a memorable picture and phrase before logging in. It offers two options: using the provided picture and phrase or picking their own. The provided picture is a row of clothes on a line, and the provided phrase is "Candle shipping enforcement". A progress indicator on the right shows five steps, with the fifth step, "Extra security", highlighted in green. A "NEXT" button is visible at the bottom.

Quilter 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](#)

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 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.

1

START

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

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

Cancel

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. Please provide one or both of your mobile and home phone numbers and then pick which one you want us to send the code to. We recommend using a mobile phone but if you choose your home number then the message containing the code will be read out to you in a short automated phone call. For the best experience, we strongly recommend you use your mobile phone to receive the security codes.

Mobile phone number
UK (+44) Send my code to this phone

Home phone number
UK (+44) Send my code to this phone

Email address

Email address

Confirm email address

5 **NEXT**

Progress

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

Need help?
[Contact us](#)

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.

The screenshot shows a web browser window displaying an 'Account registration' page. The page is titled 'Account registration' and is on 'Step 3 of 3: Username & password'. The form has two main sections: 'Create your username' and 'Create your password'. The 'Create your username' section has a text input field containing 'Pebbles2'. The 'Create your password' section has a list of requirements: 'Your password must contain: at least one lowercase letter', 'at least one uppercase letter', 'at least one number', and 'at least 8 characters'. Below these are two password input fields: 'New password' and 'Confirm new password'. A 'Next' button is located at the bottom right of the form. On the right side of the page, there is a 'Progress' section with four items: 'Personal details' (checked), 'Verification of identity' (checked), 'Username & password' (checked), and 'Extra security' (unchecked). Below the progress section is a 'Need help?' section with a 'Contact us' link. Three red annotations are present: a circle with the number '1' pointing to the 'Create your username' section, a circle with the number '2' pointing to the 'Next' button, and a circle with the number '3' pointing to an empty box below the 'Next' button.

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

[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](#)

Cancel **Previous** **1** **2** **NEXT**

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 text below reads: 'Your email has been verified. We have just sent you an authorisation code via SMS to ****199'. Below this is a prompt: '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 button labeled 'CONFIRM'. 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'. The first four steps are marked with green checkmarks, and the fifth step is highlighted with a green background 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.

Quilter

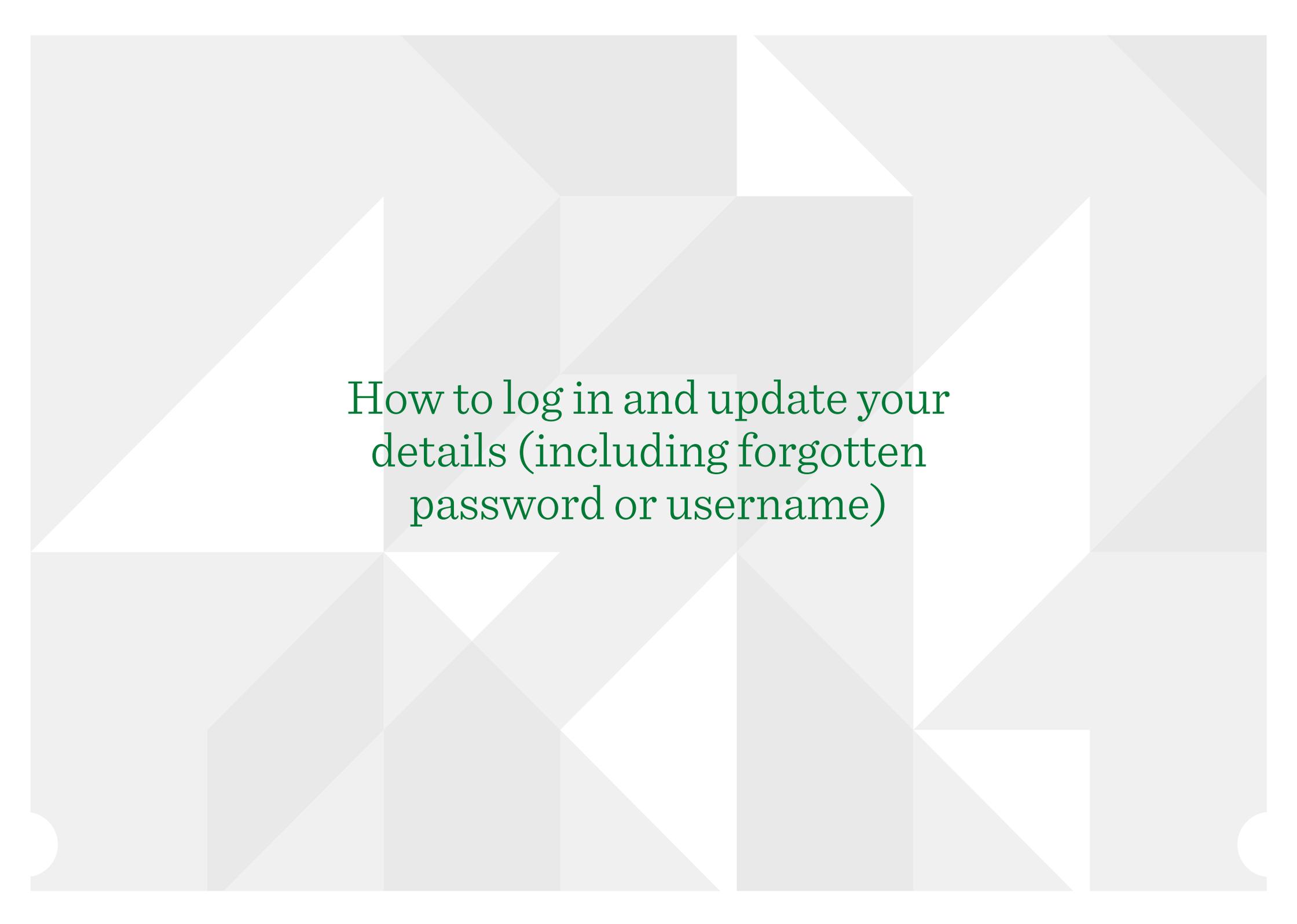
Terms and conditions

Our terms and conditions have changed and we need you to accept them before you can access the Customer Centre.

1 [Customer Online Terms and Conditions](#)
Last updated: 01/03/2019 12:00

2 I confirm I have read the terms and conditions for Quilter's Online Customer Centre and I agree to be bound by them.

3



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.

The image displays two sequential screenshots of a web login interface. The first screenshot, titled 'Login', shows a 'Username' field containing 'Pebbles3' and a 'NEXT' button. A red circle with the number '1' is positioned to the left of the username field, with an arrow pointing to it. The second screenshot, also titled 'Login', shows a 'Your memorable picture and phrase' section with a picture of colorful mugs and the phrase 'I'm no mug.'. Below this is a 'Password' field and a 'LOGIN' button. A red circle with the number '2' is positioned to the left of the memorable picture and phrase section, with an arrow pointing to it. A red circle with the number '3' is positioned to the left of the password field, with an arrow pointing to it. A red line connects the '1' and '2' markers across the two screenshots, indicating the flow of the process.

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

[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. 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

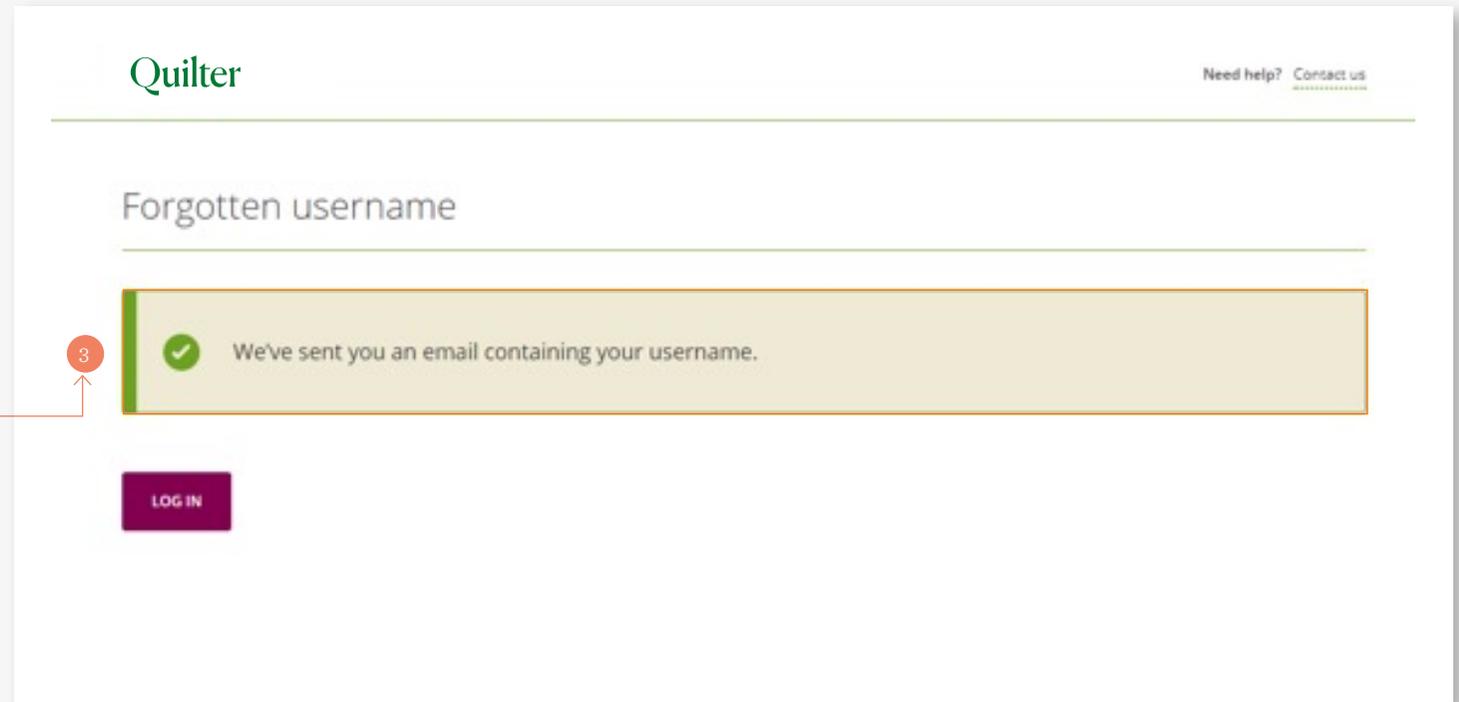
Please enter your email address

2

[CONTINUE](#)

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](#)

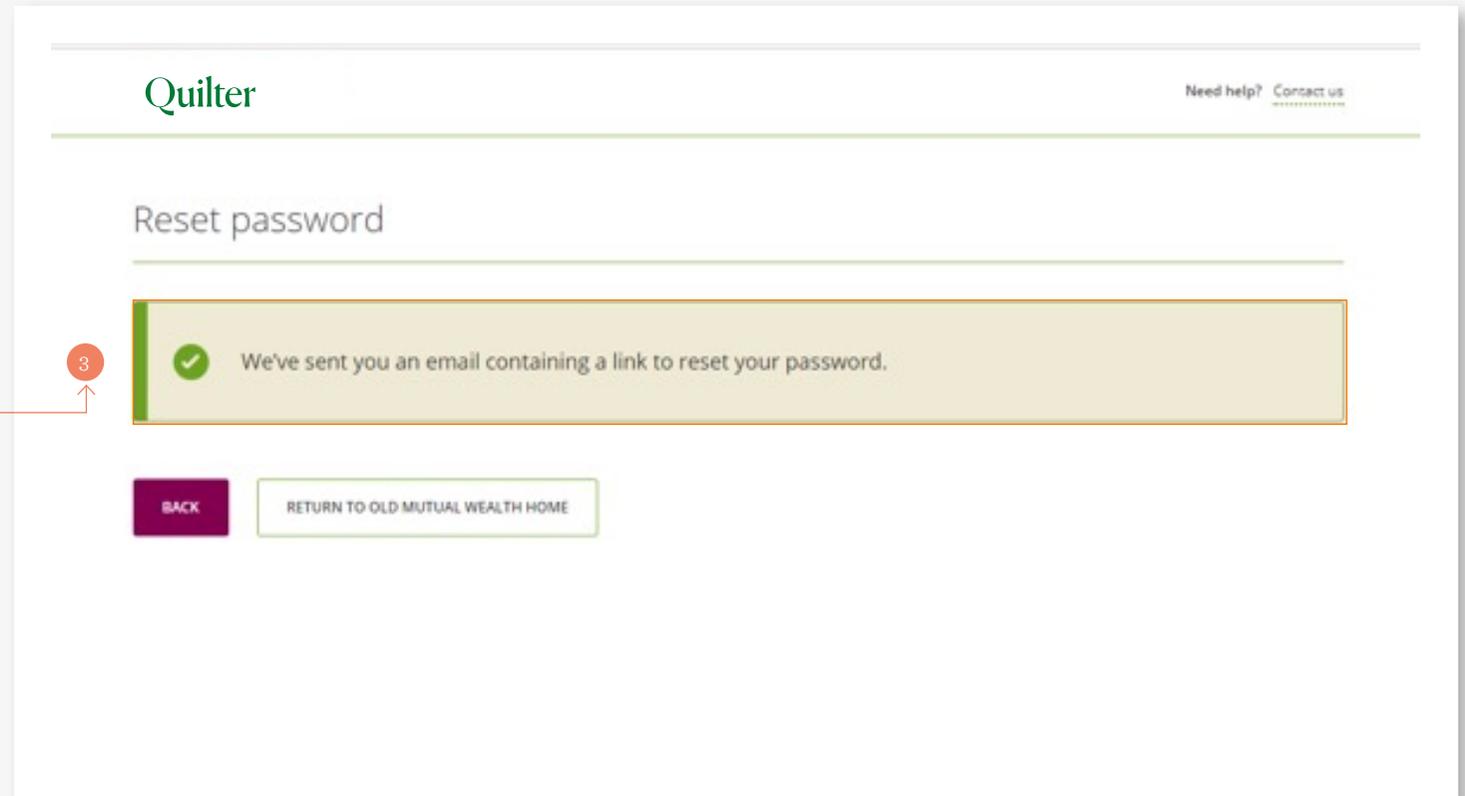
You're logging in as [CHANGE](#)

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

1 My details My messages My documents Contact us Help SIGN OUT

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 My messages My documents Contact us Help SIGN OUT

My details

2 Security details

3 Residential address

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

Update residential address

4 Correspondence address

Correspondence address is the same as residential address

Update correspondence address

5 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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