

Elevate

My Elevate investment iPad app user guide



Standard Life 

Designed to complement your online access to Elevate, it allows you to view your investments at your leisure.

What you will see

How to download

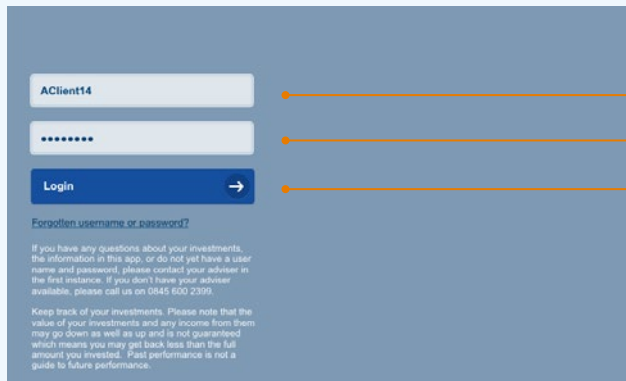


1



2

How to login

The image shows a login screen with a dark blue background. At the top, there is a text input field containing 'AClient14'. Below it is a password input field with masked characters. A blue 'Login' button with a white right-pointing arrow is positioned to the right of the password field. Below the login fields, there is a link that says 'Forgotten username or password?'. At the bottom, there is a small disclaimer in white text: 'If you have any questions about your investments, the information in this app, or do not yet have a user name and password, please contact your adviser in the first instance. If you don't have your adviser available, please call us on 0345 600 2399. Keep track of your investments. Please note that the value of your investments and any income from them may go down as well as up and is not guaranteed which means you may get back less than the full amount you invested. Past performance is not a guide to future performance.'

1

2

What you will need to do

1. Available to download on your iPad, simply search for '**My Elevate**' on the App Store or click on the icon to the left.

2. This '**My Elevate**' icon will appear on your iPad home screen.

1. Enter your **Elevate account username and password**.
This is the same username and password as you use to login to Elevate on your computer.

2. Click **Login**.
You may need to wait a few seconds for the app to load.

Notes

Please note the app is only available to download on an iPad.

If you have forgotten your password, click the link on-screen.

If you have forgotten your username, contact us on 0345 600 2399 (Monday to Friday 8am to 6pm).

Overview of the app

What you will see



What you will need to do

Once logged in, you can look at:

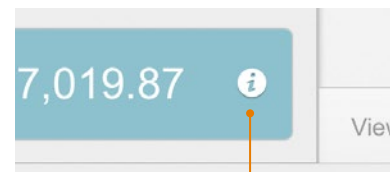
1. a summary of your investments
2. a breakdown of how your Elevate accounts are invested
3. what types of assets you are invested in
4. your transactions over the last 12 months.

Notes

Helpful Hints

Things you should know as you navigate through the app:

- ▶ All values are as at close of the previous business day.
- ▶ Where you see the ⓘ icon you can touch it for an explanatory note.



My Wealth Summary

What you will see



What you will need to do

1. See the value of your Elevate account and how this has changed over the past 12 months.

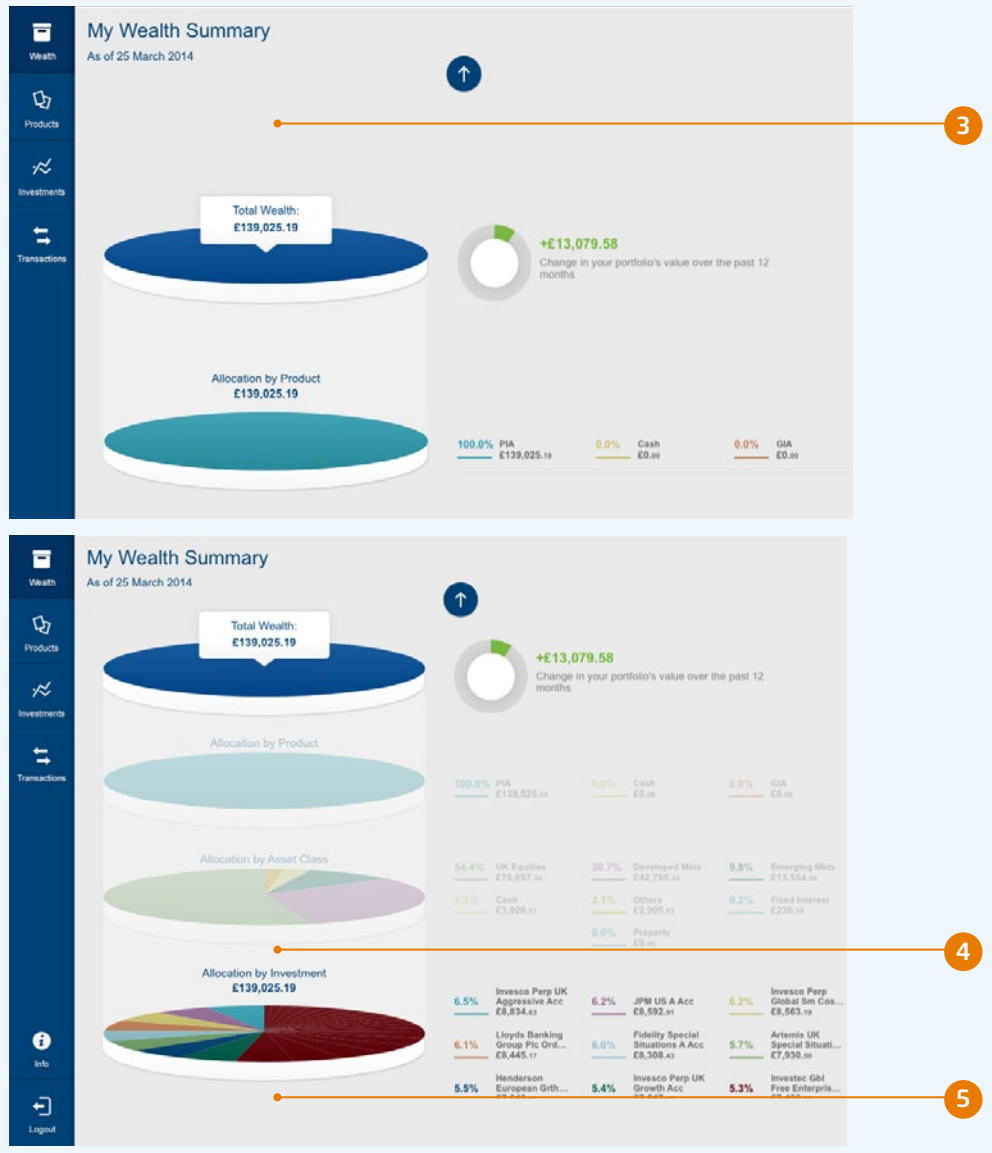
2. Touch the blue arrow to move through the screens.

Notes

If you haven't held your Elevate account for more than 12 months, you will see the same figure as your Elevate account.

My Wealth Summary

What you will see



What you will need to do

3. See how the products you hold make up your Elevate portfolio.

4. See the asset classes your total Elevate portfolio is invested in.

5. See the individual investments within your Elevate portfolio.

Notes

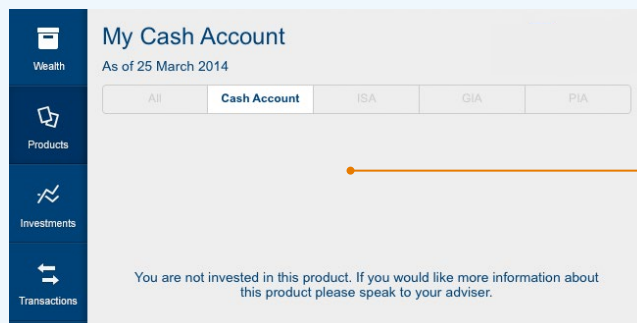
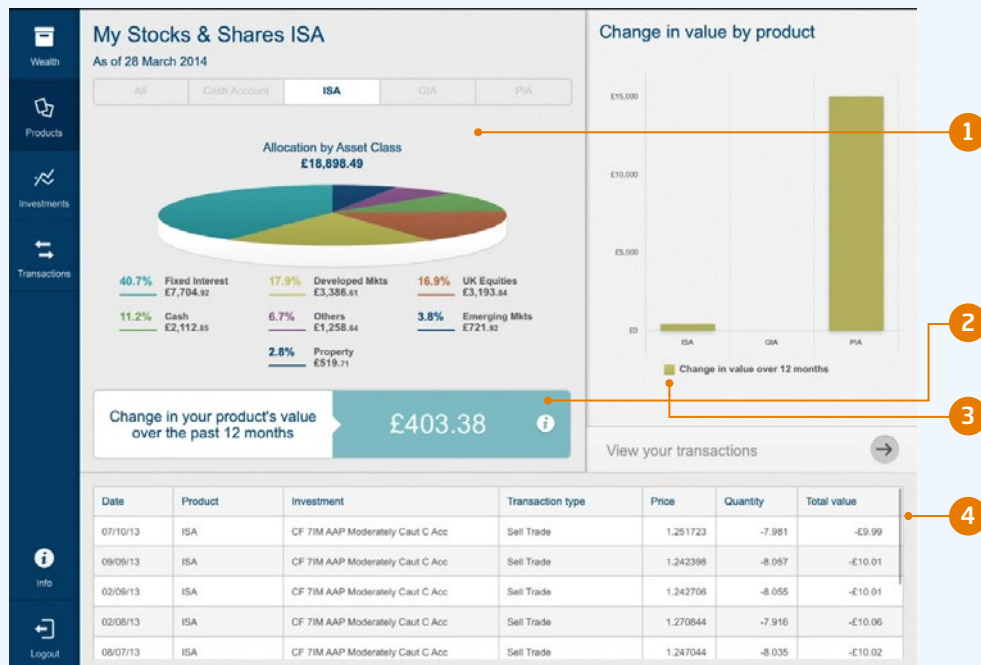
If you have the same investment in more than one product; the value of that investment will be combined under this summary.

If you have lots of investments in your Elevate account, you can scroll down the list of investments on the right hand side to see them all.

My Products Summary

What you will see

Look at your investment information for your whole Elevate portfolio or for each of the products you are invested in.



What you will need to do

The **My Products Summary** screen is presented in 4 different sections.

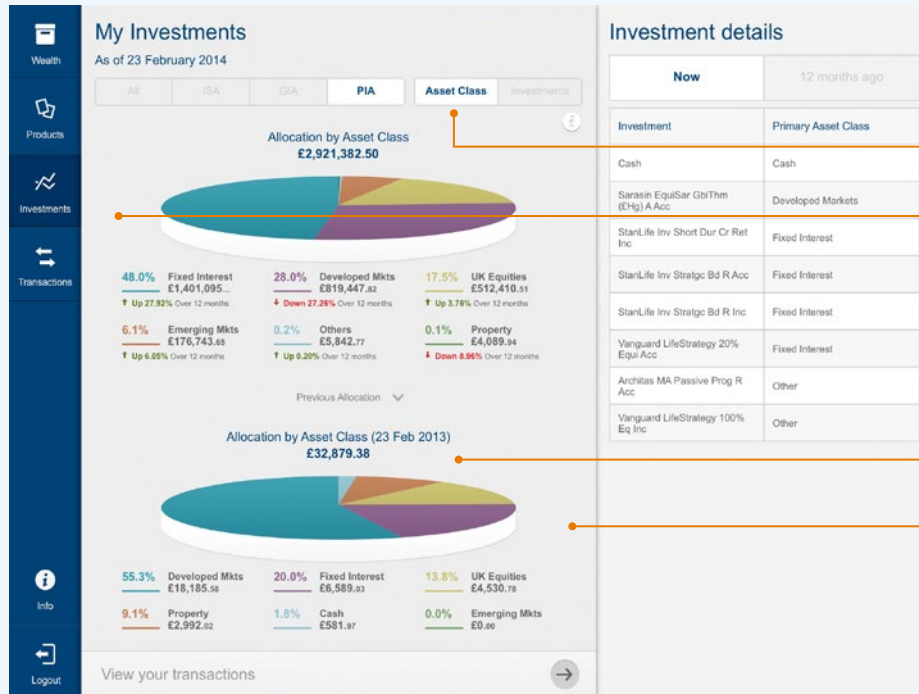
1. Shows either the allocation of your total Elevate portfolio by each product you are invested in or the breakdown of your product by asset class.
2. Shows the change in value over the last 12 months.
3. This change in value is also displayed in this bar graph.
4. See a list of your transactions under each of your products or across the whole of your Elevate portfolio.

Notes

If you are not invested in a particular product, you will see this message and the values will be set at zero.

My Investments

What you will see



What you will need to do

The **My investments** screens provide a breakdown of your Elevate portfolio.

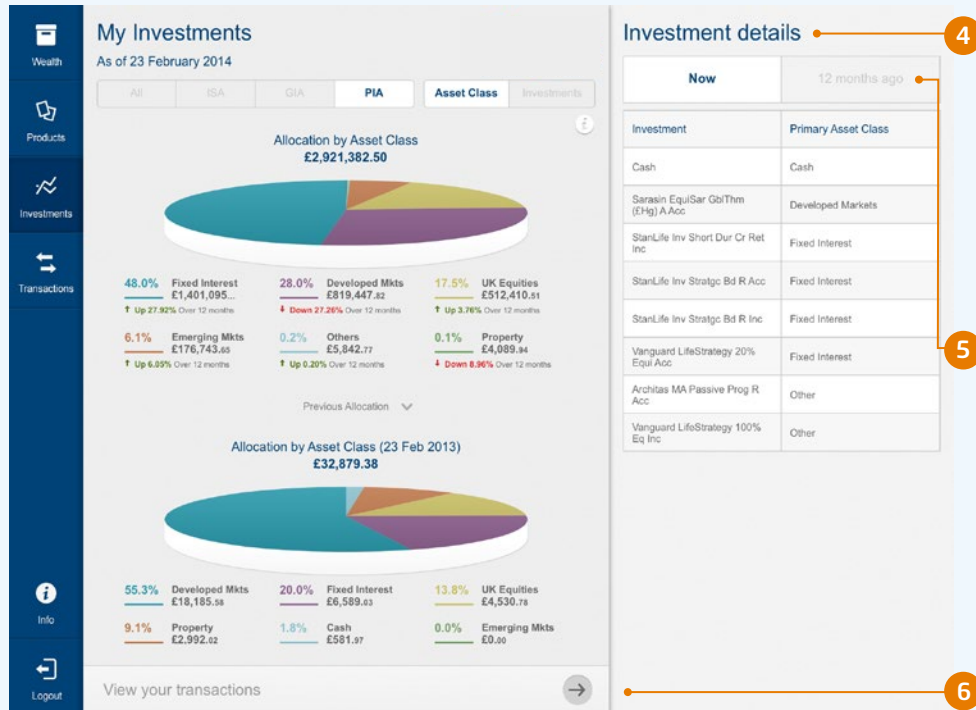
1. You can view by asset class or individual investments.
2. Shows how much is invested in each asset class and its value.
3. Shows a comparison to what that looked like 12 months ago.

Notes

If your Elevate account is less than 12 months old, this will show as a blank pie chart and the values will be set to zero.

My Investments - cont.

What you will see



What you will need to do

- The Investment details section on the right hand side provides you with a list of all your investments and their main asset class. This will always show in alphabetical order and if you are invested in more than 15 different investments you can scroll down the list.
- You can also see what this list of investments looked like 12 months ago.
- Touch this arrow and you can view your transactions which will take you to a new screen.

Notes

My Transactions

What you will see

My Transactions
Review of your latest 30 transactions up to a maximum of 12 months. Only completed transactions are shown.

My payments, transfers and withdrawals

Date	Product	Payment type	Description	Amount
16/02/14	ISA	Fee	Fund manager rebate	£31.60
12/02/14	PIA	Fee	Fund manager rebate	£27.56
11/02/14	ISA	ProductPurchase	Bought 10,814.7080 Architas MA Blended Interm R Acc	-£15,000.00
11/02/14	ISA	CapitalMovement	Direct Credit	£15,000.00
06/02/14	GIA	Tax	Income Tax on Rebate	-£0.17

My trades and income

Date	Product	Investment	Transaction type	Price	Quantity	Total value
31/01/14	GIA	Architas MA Passive Interm R Acc	Buy Trade	1.457	5490.734	£8,000.00
31/01/14	GIA	Architas MA Active Interm Inc A Acc	Buy Trade	1.157	864.304	£1,000.00
30/10/13	ISA	OBSR Adventurous Portfolio v5	Buy Trade	1.143615	349.768	£400.00
23/09/13	ISA	OBSR Adventurous Portfolio v5	Buy Trade	1.127763	354.685	£400.00
22/08/13	ISA	OBSR Adventurous Portfolio v5	Buy Trade	1.096823	364.690	£400.00

What you will need to do

The **My Transactions** screen shows your transaction history over the past 12 months.

1. Table 1 shows a list of what payments have made into your Elevate account, when and what withdrawals have been.
2. Table 2 looks at your investment transactions showing any investments that have been brought or sold; any transfers in or out; any re-registration of assets or any movement of your money between your products.

Notes

If you have more transactions that are shown on the table, you can scroll the list up and down to view them.

Get to know us better

If you have any difficulties accessing your Elevate account, please contact your adviser in the first instance. You can also call us on 0345 600 2399 (8am to 6pm Monday to Friday).

Call us on 0345 600 2399

Our lines are open 8am to 6pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at enquiries@elevateplatform.co.uk

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

Follow us on Twitter [@Elevateplatform](https://twitter.com/Elevateplatform)

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