



Frequently asked questions

Section 1:

General Questions

Frequently asked questions



Q1. Why should I use the Your Wealth app?

- A. **Your Wealth** gives you financial peace of mind, and the ability to view your entire financial life in one place. **Your Wealth** allows you to track the value of investments and assets, alongside any liabilities. Not only that but you have a secure method of communicating with us and we will share documents with you when required. All in one place, safely, and securely.

Q2. How do I access Your Wealth?

- A. **Your Wealth** can be accessed by visiting yourwealth.om.uk from your preferred internet browser

We recommend that for the loading or amending details within the portal, you use the web-based access rather than accessing the app through a smart phone or tablet.

You can also access **Your Wealth** through your mobile phone or tablet, by downloading the **Your Wealth** app from either the Google Play (Android) or Apple stores (iPhone). To locate the app, please type 'Old Mill' into the search bar. The **Your Wealth** app should then be available on the first page.

Q3. What will Old Mill put on to the Your Wealth app for me?

- A. All plans that Old Mill hold in our system will be automatically added to **Your Wealth** for you, as well as any important documents.



Q4. How are my Old Mill plans updated in Your Wealth?

- A. Any investment or pension plans managed by Old Mill will be updated either by electronic data feeds or by the team dependent on the data available from the providers of your plans. The valuation 'strength' is indicated alongside each plan using a 'wifi' style signal indicator.

Saving & Investments £278,835

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|------------------------------|-------------|---|
| | | |
| An ISA - PR 1000292 | £51,768.17 | 📶 |
| Investment Plan - HARX007831 | £28,941.80 | 📶 |
| moneyinfo Portfolio | £198,125.00 | 📶 |

- Three bars mean that the unit price and unit holdings are being updated via an electronic data feed from your provider and should always be up to date.
- Two bars mean that the unit prices are being updated via a direct price feed, but units are being manually updated periodically by the team at Old Mill so may not be up to date.
- One bar means that the value of the item is manually updated occasionally by the team at Old Mill or are not looked after by them and so may be an estimate.

Q5. What is the benefit of using Your Wealth for messaging?

- A. You will be notified when a secure message is sent to you and we are using this method to communicate with you in order that you know the message is genuine because it is being delivered securely by **Your Wealth** and not sent via password protected email.

Q6. What is the benefit of using Your Wealth for sharing documents?

- A. **Your Wealth** allows for documents to be accessed immediately, without waiting for the postman, and allows you to access the documents when you need them most, wherever you are and on whatever device you are using. We care for the environment too and want to take steps to reduce the amount of paper we're using.

Q7. I have a query regarding the information being displayed in Your Wealth, who do I contact?

- A. In the first instance, please send us a secure message from the Messaging area of the portal, or if it's of an urgent nature please contact your Old Mill Financial Planner.



Q8. Can I download the documents that are sent to me in Your Wealth?

- A. Yes, you can download any documents, however they are stored within **Your Wealth** and can be easily accessed anytime. We would encourage you not to download documents unless you have a specific need, as the documents are stored securely and backed up to ensure the security is maintained at all times.

Q9. What is the maximum size document I can add to Your Wealth?

- A. The maximum size document is 5MB.

Q10. Who is moneyinfo?

- A. moneyinfo Limited has developed and maintains **Your Wealth** and is our chosen technology partner. More information can be found here www.moneyinfo.com

Q11. I cannot remember my log in details, what can I do?

- A. If you have forgotten your password, go to the login section of yourwealth.om.uk and input your e-mail address to reset your password. An email will be sent to you containing a link allowing you to validate yourself by responding to security questions and then to reset your password. Once you have logged in to **Your Wealth** you will be able to amend your username, password or security questions by clicking on me > Settings.

Q12. What is happening to the existing OneClick workspace (CCH portal) I use?

- A. Any communications and documents from your financial planner and their team relating to your investments and financial plan will now be sent using the **Your Wealth** app.

If you are also an Accountancy client of Old Mill your accountant and their team will continue to use OneClick for communicating with you.

The reason for this is that neither system provides the full functionality required by both your financial planner and your accountant.



Section 2:

Security

Frequently asked questions



Q13. How secure is it?

- A. As you would expect, cyber security is of the utmost importance to us and our carefully selected technology partner. All data within **Your Wealth** is fully encrypted and together with other security measures ensures your data is protected at all times.

Q14. Here's the technical bit...

- A. All information is securely sent and received encrypted, which means that information cannot be read by anyone listening between your computer and the **Your Wealth** service. Even when we process any of your data internally, we still encrypt it.

Our technology partner, moneyinfo, protects the infrastructure in several ways using advanced technologies and also using a Security Operations Centre (SOC), which constantly monitors what happens in the **Your Wealth** environments. This means if something looks suspicious, the SOC will inform us immediately. moneyinfo's infrastructure is designed in such a way to allow for high availability; if there's a blip and something goes wrong in our facilities, a spare piece of the environment automatically picks it up, which ensures that you can still access your information seamlessly. Also, your data is stored in an environment located in an ISO27001 certified facility, that is protected by the very best in physical security, electronic security and internal security policies to ensure that your details remain totally secure.

Q15. How private is my data?

- A. Your privacy and trust are our highest priority and so we put extensive safeguards in place to protect your identity, privacy and financial data at all times. When you add your own information on to **Your Wealth** you can decide who it is shared with using the privacy controls.



Q16. Is my data protected under the Data Protection Act?

- A. Old Mill strictly adheres to the General Data Protection Regulation and the Data Protection Act (DPA 2018), so you can be assured that any data, documents or messages are kept safe and secure with rigid data protection principles in mind. We do not share any data or information with third parties, unless given explicit consent by you.

Q17. What happens to my data if I no longer use Your Wealth?

- A. If you decide to no longer be a client of Old Mill then access to **Your Wealth** will be revoked. You will have an opportunity to download your data in line with the regulatory requirements. All data will be completely deleted from the servers after 30 days from the deletion of your account.

Q18. What controls are in place at moneyinfo to ensure the security of my data?

- A. Moneyinfo is a Financial Conduct Authority (FCA) registered firm whose services are regulated as an Account Information Service Provider.

As part of this process Moneyinfo is required to report regularly to the FCA and is subject to ongoing operational and security scrutiny to ensure that they protect the interests of their clients.

In addition, all Directors and responsible management are required to pass fitness and propriety checks before being authorised to run the business.

Statement – These FAQs should be read in conjunction with T&Cs and Privacy Policy





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yourwealth.om.uk

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