

IFGL

INTERNATIONAL
FINANCIAL
GROUP LIMITED

FPI PORTAL PASSWORD RESET

Adviser Journey



PORTAL MIGRATION – PASSWORD RESET

As part of the migration of FPI Portal, all users will be required to reset their passwords upon initial login post migration.

This document is aimed at assisting advisers on how to navigate the initial login.

Depending on how the agent is set up to receive their OPT (One Time Password), they may require their agency code to login:

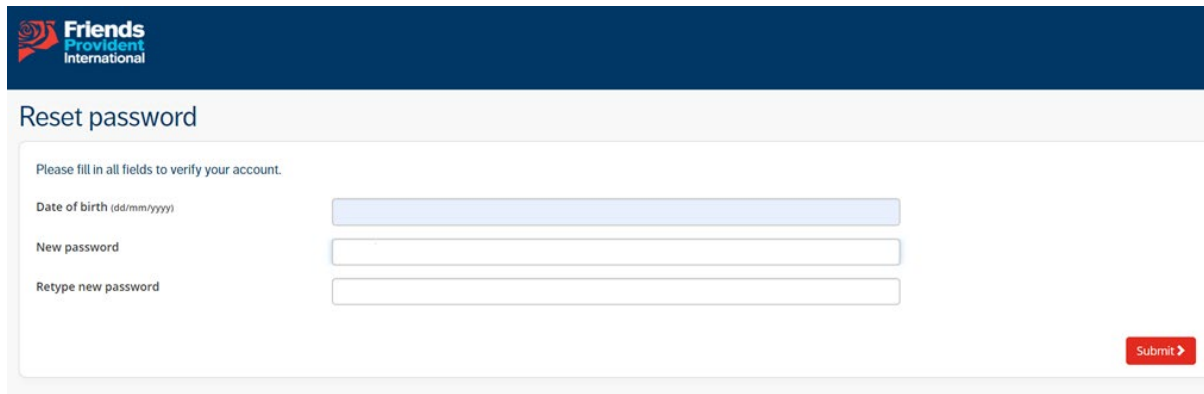
User Type & OTP Method	Agency Code Required
Adviser, OTP via SMS	✘
Adviser, OTP via email	✔

Password Reset Journey - Adviser

The first time an adviser attempts to login to the FPI Portal, the system will run a validation check on the user's online account to check their OTP retrieval method.

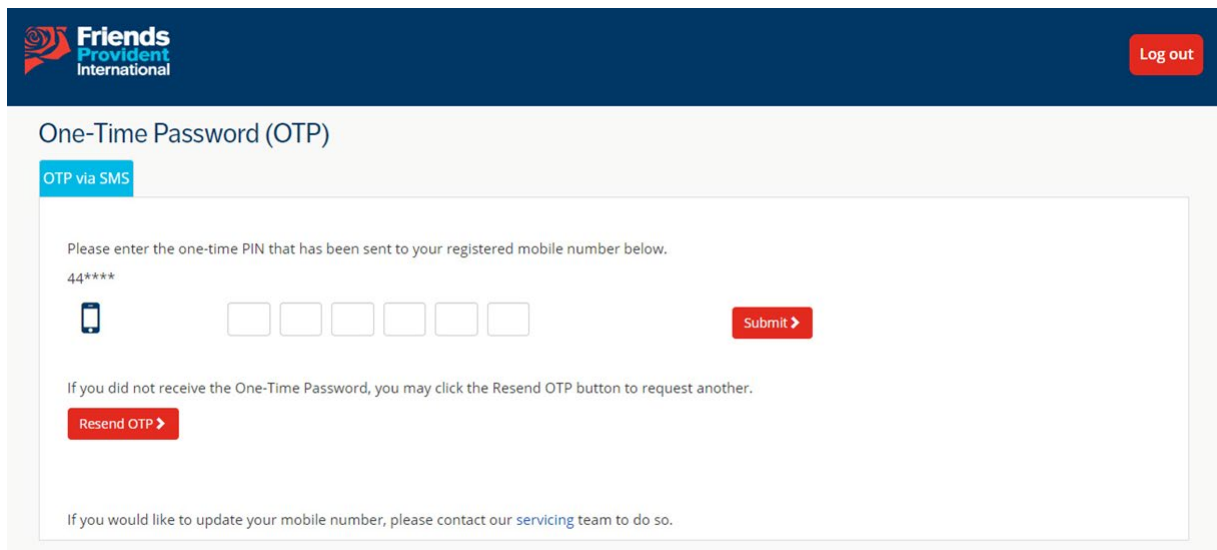
Adviser – OTP via SMS

As standard, an adviser account would have their OTP set to be received via SMS message. Should the system validate this scenario, the adviser will be greeted with the below screen after attempting to login:



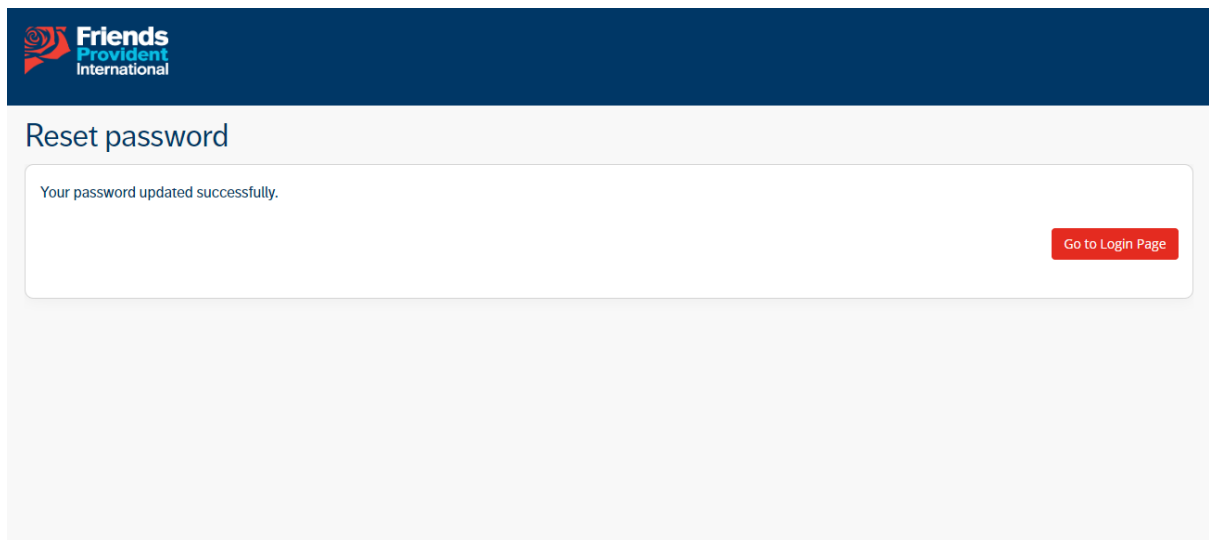
The screenshot shows the 'Reset password' form. At the top left is the Friends Provident International logo. The title 'Reset password' is centered. Below the title, a message reads: 'Please fill in all fields to verify your account.' There are three input fields: 'Date of birth (dd/mm/yyyy)', 'New password', and 'Retype new password'. A red 'Submit' button with a right-pointing arrow is located at the bottom right of the form area.

The adviser will be sent an OTP via SMS to the mobile number associated with their account:

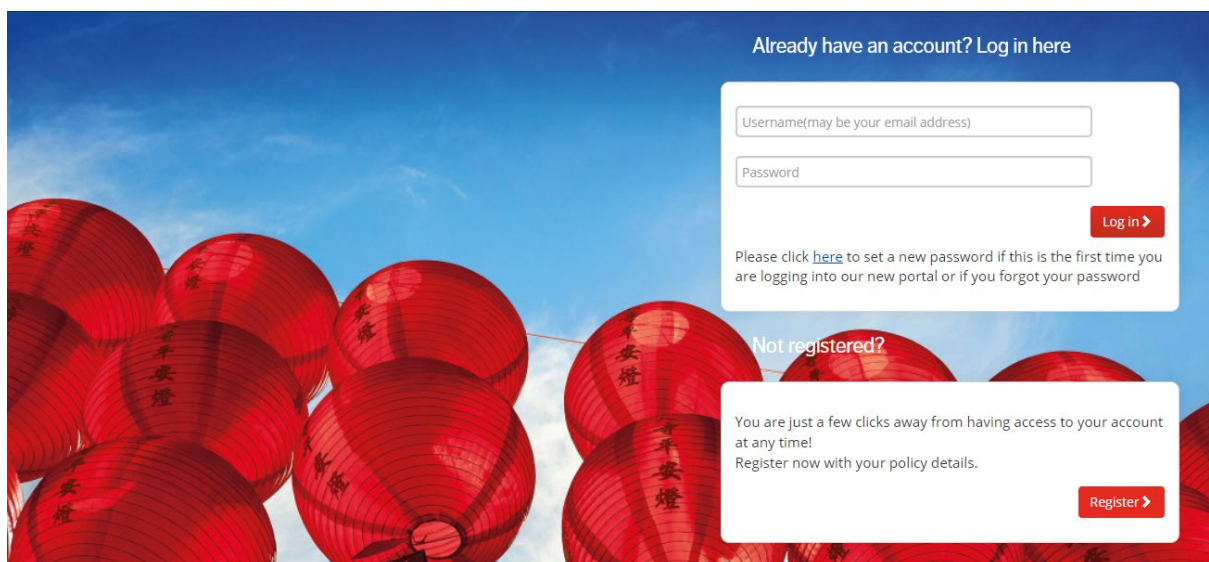


The screenshot shows the 'One-Time Password (OTP)' verification screen. At the top left is the Friends Provident International logo. At the top right is a red 'Log out' button. The title 'One-Time Password (OTP)' is centered. Below the title, a blue tab labeled 'OTP via SMS' is visible. A message reads: 'Please enter the one-time PIN that has been sent to your registered mobile number below.' Below this, the text '44****' is shown next to a mobile phone icon and six empty input boxes for the PIN. A red 'Submit' button with a right-pointing arrow is to the right of the input boxes. Below the input area, a message reads: 'If you did not receive the One-Time Password, you may click the Resend OTP button to request another.' A red 'Resend OTP' button with a right-pointing arrow is below this message. At the bottom, a message reads: 'If you would like to update your mobile number, please contact our servicing team to do so.'


Once the OTP has been received and entered, the new password will be updated within our system and the adviser will receive a confirmation message:



The adviser must then return to the home page and login with their new password:



The adviser will receive a new OTP via SMS to the mobile number associated with their account:


Log out

One-Time Password (OTP)

OTP via SMS

Please enter the one-time PIN that has been sent to your registered mobile number below.

44****



Submit >

If you did not receive the One-Time Password, you may click the Resend OTP button to request another.

Resend OTP >

If you would like to update your mobile number, please contact our servicing team to do so.

The adviser will then be required to accept the FPI Portal terms of use:

Portal Terms of use

These Terms of use are for Customers only.

Please read through the following Terms and conditions of use ('Terms') as, by using this Website, you agree to be bound by them. These Terms may be varied from time to time as set out below.

References on this Website to 'Friends Provident International', 'us' and 'we' mean references to Friends Provident International Limited or its successor in title.

If you are accessing this Website from outside the UK or the Isle of Man, local legislation may not permit us to provide our products in your own country. You should confirm with your financial adviser as to whether our products are available in your country of residence.

Definitions

'Content' means certain material and information av'Services' means the services, including the Website and all serviceavailable on this Website and made available to you.

'Services' means the services, where made available to you, on this Website that allow you to electronically interact with this Website and other Friends Provident International websites and services.

'Website' means the website located at portal.fpinternational.com.

Website

The Content of this Website does not constitute financial advice. We provide you with the information including options available to you. We are not giving you advice about the suitability of any product or service for you. We are informing you only about what you can do. We are not advising you what you should do and we cannot offer an opinion about that. You are responsible for deciding for yourself if a product or service meets your needs. If you are in any doubt you should consult an authorised independent financial adviser, who may charge for the advice.

We have taken all reasonable steps to ensure the accuracy and completeness of the Content that Friends Provident International produces and provides on this Website. Some of the Content may be produced by third parties. Where third parties have provided the Content we:

- ▶ are not liable or responsible for it; and
- ▶ have not endorsed it; and
- ▶ do not give any representations or warranties, expressed or implied, as to its accuracy.

We will use reasonable efforts to make this Website available for access at all times. However due to the nature of the internet, there may be circumstances when this Website or part of it is unavailable or access is suspended. Consequently we exclude any warranties, undertakings or representations (either expressed or implied) to the full extent permitted under the law, that this Website, Content or Services are available for use.

We accept no liability for loss of any kind incurred directly or indirectly including economic losses (without limitation loss or revenues, data, profits, use, opportunity, business or anticipated savings) arising out of the unavailability of this Website, Content or Services.

We may make changes to the Content or Services described on this Website:

- ▶ to take into account any material change in the law (or interpretation of the law), regulations or recommendations of our regulators;
- ▶ to provide for new or improved products or Services; if we reasonably believe that the change is necessary to protect the interests of Friends Provident International; or for any valid reason not stated in these Terms.

We will give you 30 days notice if we make a change to the Content or Services, unless the change is to your advantage or of no disadvantage to you. If the change is to your advantage or of no disadvantage, we can make the change immediately, without notice.

Where we have included links to third party websites we are not making any statement, warranty or representation as to the quality or contents of the other website as we do not have responsibility for that other website. Please note that when accessing another website by way of a hypertext link you may leave this Website.

To access this Website you will have been given a username and password and be required to set up and answer security questions. You are responsible for ensuring that your username, password and security questions are kept secret and not divulged to any third party. You must inform us immediately of any breach of this requirement.

Friends Provident International may terminate your right to use this Website, the Content and Services at its absolute discretion:-

- ▶ by giving you one month prior written notice at any time; or
- ▶ by giving you notice with immediate effect if you are in breach of these Terms.

On termination of your right to use this Website, your right to access the Content and Services, if relevant, will cease.

Friends Provident International reserves the right to vary these Terms from time to time by posting an amended version on this Website.

If any provision or part of a provision, of these Terms is found by the courts to be illegal, invalid or unenforceable, such provision shall be deemed to have been deleted and the remaining provisions shall remain in force.

Friends Provident International does not seek to exclude or limit any liability it may have under the UK Financial Services and Markets Act 2000 or the Isle of Man Insurance Act 2008 or the rules of its regulators which we are bound to comply with.

Privacy and cookies

For information about Privacy, data security and cookies please see the Friends Provident International Privacy and cookies policies.

Governing Law

These Terms and the use by you of this Website are governed and construed in accordance with the laws of England and Wales. By accessing this Website and the Services provided you agree to submit to the exclusive jurisdiction of the courts of England and Wales in relation to any claim or dispute arising out of your use of this Website.

I have read and accept these Terms and conditions of use.

Continue >

Log out

After the FPI Portal terms of use have been accepted the adviser will be brought to their dashboard, this completes the password reset journey for this scenario:

The dashboard header includes the Friends Provident International logo, a secure mailbox indicator, a welcome message for Joel Sheeley, and a log out button. The user's last log in date is 2023-02-10 11:23 (GMT+1). The main content area features a search bar and two tables.

Status	Count
Proposal	67
In Force	591
Lapsed	81
Surrendered	235
Expired	4
Death	2
Matured	2
Cancelled	3

Status	Count
Proposal	927
In Force	2424
Lapsed	747
Surrendered	843
Expired	55
Death	13
Matured	6
Cancelled	23

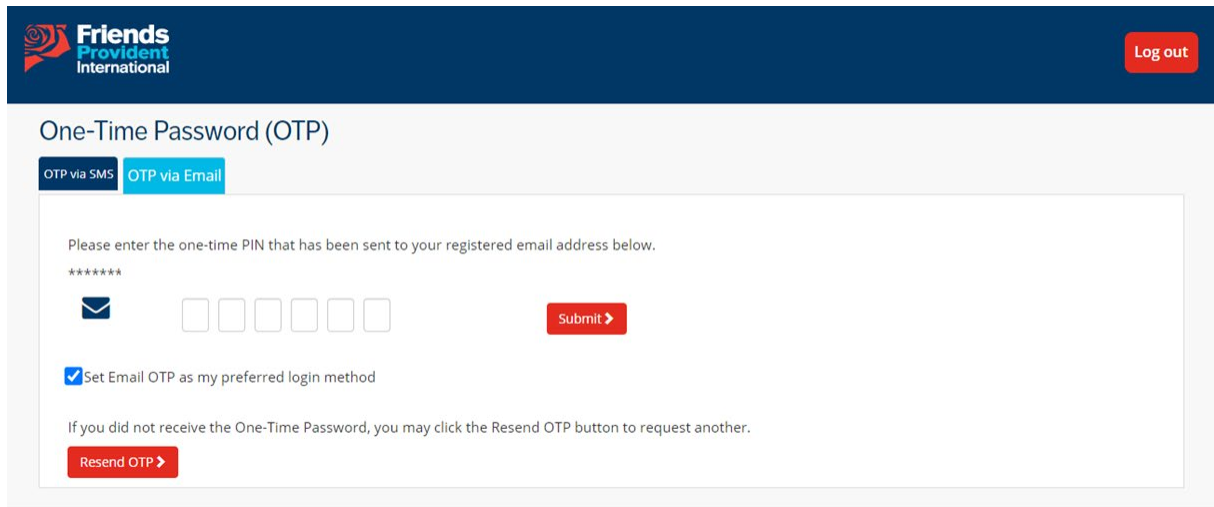
Adviser – OTP via email

Some adviser accounts require the OTP to be received via an email. Should the system validate an account as being set to receive the OTP via email, the adviser will be greeted with the below screen when attempting to login:

The 'Reset password' form includes a message: 'We have enhanced the security on Portal and as a result now require you to reset your password'. The form fields are: Date of birth (dd/mm/yyyy), Agency code, New password, and Retype new password. A red arrow points to the Agency code field.

For Adviser using email OTP, an additional security requirement of providing Agency code is required

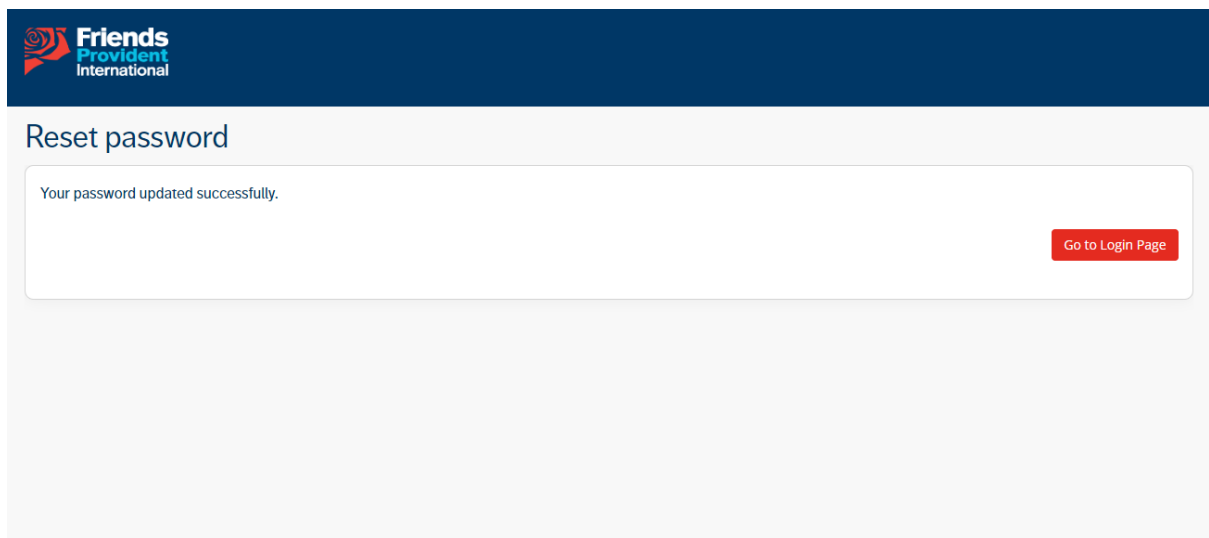
Once the agency code has been entered the adviser will be sent an OTP via email to the address associated with their account:



The screenshot shows the 'One-Time Password (OTP)' page. At the top left is the 'Friends Provident International' logo. At the top right is a 'Log out' button. Below the title, there are two tabs: 'OTP via SMS' and 'OTP via Email', with the latter being selected. The main content area contains the following text and elements:

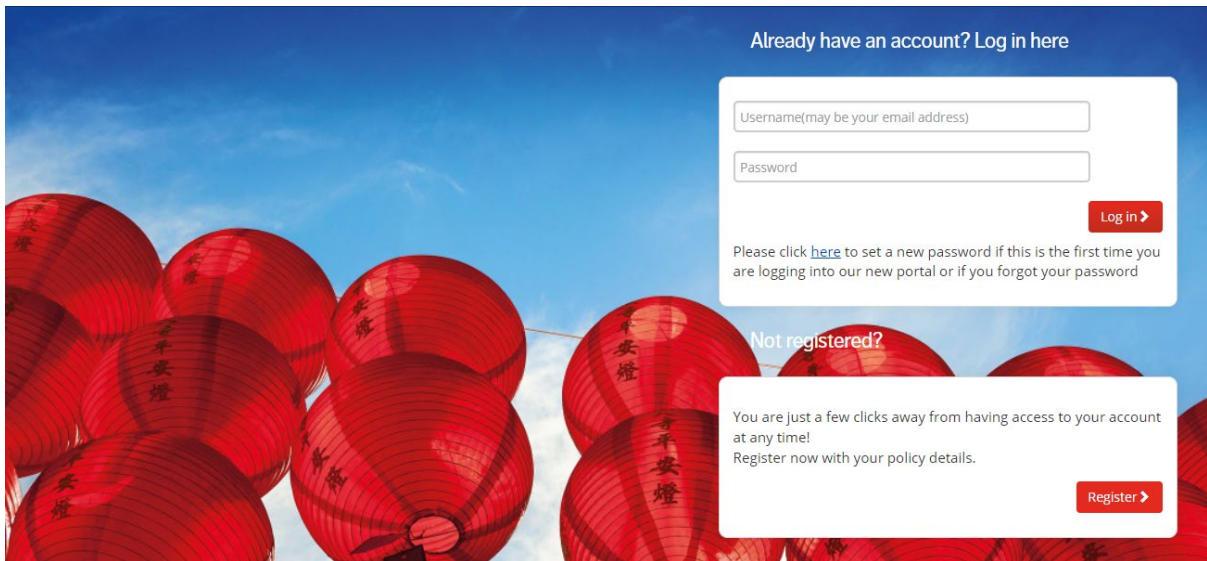
- Text: "Please enter the one-time PIN that has been sent to your registered email address below."
- Text: "*****"
- Form: An email icon followed by six empty input boxes for the PIN, and a red 'Submit' button with a right-pointing arrow.
- Text: "Set Email OTP as my preferred login method" with a checked checkbox.
- Text: "If you did not receive the One-Time Password, you may click the Resend OTP button to request another."
- Text: "Resend OTP" button with a right-pointing arrow.

Once the OTP has been received and entered, the new password will be updated within our system and the adviser will receive a confirmation message:



The screenshot shows the 'Reset password' page. At the top left is the 'Friends Provident International' logo. Below the title, there is a confirmation message: "Your password updated successfully." At the bottom right of the message box is a red button labeled "Go to Login Page".

The adviser must then return to the home page and login using their new password:



Already have an account? Log in here

Username(may be your email address)

Password

Log in →

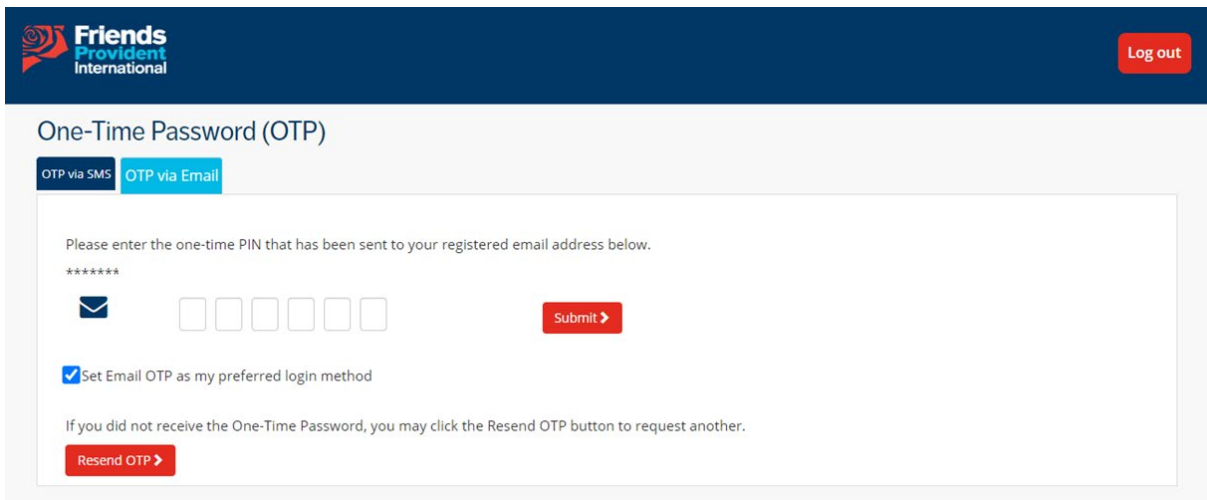
Please click [here](#) to set a new password if this is the first time you are logging into our new portal or if you forgot your password

Not registered?

You are just a few clicks away from having access to your account at any time!
Register now with your policy details.

Register →

The adviser will receive a new OTP via email to the address associated with their account:




Friends Provident International Log out

One-Time Password (OTP)

OTP via SMS | **OTP via Email**

Please enter the one-time PIN that has been sent to your registered email address below.



Submit →

Set Email OTP as my preferred login method

If you did not receive the One-Time Password, you may click the Resend OTP button to request another.

Resend OTP →

The adviser will be required to accept the FPI Portal terms of use:

Portal Terms of use

These Terms of use are for Customers only.

Please read through the following Terms and conditions of use ('Terms') as, by using this Website, you agree to be bound by them. These Terms may be varied from time to time as set out below.

References on this Website to 'Friends Provident International', 'us' and 'we' mean references to Friends Provident International Limited or its successor in title.

If you are accessing this Website from outside the UK or the Isle of Man, local legislation may not permit us to provide our products in your own country. You should confirm with your financial adviser as to whether our products are available in your country of residence.

Definitions

'Content' means certain material and information and 'Services' means the services, including the Website and all serviceable on this Website and made available to you.

'Services' means the services, where made available to you, on this Website that allow you to electronically interact with this Website and other Friends Provident International websites and services.

'Website' means the website located at portal.fpiinternational.com.

Website

The Content of this Website does not constitute financial advice. We provide you with the information including options available to you. We are not giving you advice about the suitability of any product or service for you. We are informing you only about what you can do. We are not advising you what you should do and we cannot offer an opinion about that. You are responsible for deciding for yourself if a product or service meets your needs. If you are in any doubt you should consult an authorised independent financial adviser, who may charge for the advice.

We have taken all reasonable steps to ensure the accuracy and completeness of the Content that Friends Provident International produces and provides on this Website. Some of the Content may be produced by third parties. Where third parties have provided the Content we:

- ▶ are not liable or responsible for it; and
- ▶ have not endorsed it; and
- ▶ do not give any representations or warranties, expressed or implied, as to its accuracy.

We will use reasonable efforts to make this Website available for access at all times. However due to the nature of the internet, there may be circumstances when this Website or part of it is unavailable or access is suspended. Consequently we exclude any warranties, undertakings or representations (either expressed or implied) to the full extent permitted under the law, that this Website, Content or Services are available for use.

We accept no liability for loss of any kind incurred directly or indirectly including economic losses (without limitation loss or revenues, data, profits, use, opportunity, business or anticipated savings) arising out of the unavailability of this Website, Content or Services.

We may make changes to the Content or Services described on this Website:

- ▶ to take into account any material change in the law (or interpretation of the law), regulations or recommendations of our regulators;
- ▶ to provide for new or improved products or Services; if we reasonably believe that the change is necessary to protect the interests of Friends Provident International; or for any valid reason not stated in these Terms.

We will give you 30 days notice if we make a change to the Content or Services, unless the change is to your advantage or of no disadvantage to you. If the change is to your advantage or of no disadvantage, we can make the change immediately, without notice.

Where we have included links to third party websites we are not making any statement, warranty or representation as to the quality or contents of the other website as we do not have responsibility for that other website. Please note that when accessing another website by way of a hypertext link you may leave this Website.

To access this Website you will have been given a username and password and be required to set up and answer security questions. You are responsible for ensuring that your username, password and security questions are kept secret and not divulged to any third party. You must inform us immediately of any breach of this requirement.

Friends Provident International may terminate your right to use this Website, the Content and Services at its absolute discretion:

- ▶ by giving you one month prior written notice at any time; or
- ▶ by giving you notice with immediate effect if you are in breach of these Terms.

On termination of your right to use this Website, your right to access the Content and Services, if relevant, will cease.

Friends Provident International reserves the right to vary these Terms from time to time by posting an amended version on this Website.

If any provision or part of a provision, of these Terms is found by the courts to be illegal, invalid or unenforceable, such provision shall be deemed to have been deleted and the remaining provisions shall remain in force.

Friends Provident International does not seek to exclude or limit any liability it may have under the UK Financial Services and Markets Act 2000 or the Isle of Man Insurance Act 2008 or the rules of its regulators which we are bound to comply with.

Privacy and cookies

For information about Privacy, data security and cookies please see the Friends Provident International [Privacy and cookies](#) policies.

Governing Law

These Terms and the use by you of this Website are governed and construed in accordance with the laws of England and Wales. By accessing this Website and the Services provided you agree to submit to the exclusive jurisdiction of the courts of England and Wales in relation to any claim or dispute arising out of your use of this Website.

I have read and accept these Terms and conditions of use.

[Continue >](#)

[Log out](#)

After the FPI Portal terms of use have been accepted the adviser will be brought to their usual dashboard, this completes the password reset journey for this scenario:

The screenshot shows the Friends Provident International dashboard. At the top, there is a dark blue header with the company logo on the left, a 'Secure Mailbox (0)' indicator, a 'Welcome Joel Sheeley' message, and a 'Log out' button. Below the header, a search bar is present with the text 'Search plan/policy/customer' and a secondary search field for 'Search for your own cases...'. The main content area is divided into two columns. The left column contains a vertical navigation menu with icons and labels for 'My dashboard', 'Transaction Status', 'Search portfolio', 'Commission', 'Illustrations', and 'Document center'. The right column displays two tables. The first table, 'Portfolio of subordinate cases', lists various statuses and their counts. The second table, 'Portfolio of own cases', also lists statuses and counts. Both tables have a red button at the bottom right to 'List all subordinate cases' or 'List all own cases'. The user's last log in date is shown as 2023-02-10 11:23 (GMT+1).

Status	Count
Proposal	67
In Force	591
Lapsed	81
Surrendered	235
Expired	4
Death	2
Matured	2
Cancelled	3

Status	Count
Proposal	927
In Force	2424
Lapsed	747
Surrendered	843
Expired	55
Death	13
Matured	6
Cancelled	23

Password Reset Journey – FAQ

Although we believe the password reset journey to be straightforward, there may be instances wherein a client or an adviser will contact us to seek reassurance or assistance.

Q: A client or adviser has contacted us questioning why they need to reset their password, how should I respond?

A: Confirm to the user that, as part of the migration of systems away from Aviva/Singlife we require all users to perform a password reset to ensure security and audit guidelines are met. Reassure the user that you as a staff member have also had to reset your password and you sympathise with any frustrations caused by this request.

Q: A client with OTP via email has contacted us stating the system is not accepting their policy number, how can I assist?

A: Confirm the policy number the client is attempting to use and perform validation checks to ensure that it is a genuine FPI Policy/Plan number.

****note: it is good practice to spoof the clients account in order to confirm exactly what policy/plan number is associated with their online account****

Q: A client has contacted us asking for confirmation of their policy/plan number, how can I resolve this query?

A: Please follow the standard security procedures used to validate a client.

Once security procedures have been met you can confirm the user's policy/plan number to them.

Q: An adviser has contacted us asking for confirmation of their agency code, how can I resolve this query?

A: The quickest method of resolving this query would be to ask the adviser to send an email to: fpi.extranet@fpinternational.com requesting confirmation of the agency code linked to their online account.

The commission's team will be monitoring this inbox and are able to accept requests for confirmation via email as long as the email is sent from the address linked to the adviser's online account.

Q: An adviser has contacted us asking for further assistance, who should I contact?

A: Please ask the adviser to send an email to: fpi.extranet@fpinternational.com detailing their request.

