



Wellesley

My Wellesley

(also known as WealthSafe)

You can be assured that managing your affairs through My Wellesley, our digital document storage, is as easy as it gets.

From Wills to investment certificates, all easily and instantly searchable in the one place, protected by enterprise-grade security, the days of hunting through years of paperwork for an important document are over.

Accepting, signing and managing documents shared by an adviser is as simple as a couple of clicks, while scanning and filing physical paperwork is as easy as taking a photo.

Logging in for the first time

If you are logging in for the first time, use the link below and follow the simple steps:

<https://app.wealthsafe.co.uk/ftl>

1. Enter your email address and click 'Next'.
2. PIN verification – select 'Send PIN'. You will now receive a unique PIN code – enter this code and click 'Enter'.
3. Choose a password. Enter a password of your choice and follow the on-screen instructions.

Mobile App quick-start guide

You can download the app using the QR code below or by searching for this on either the App Store or Play Store.



1. Enter the username and password created when you registered the account, then tap 'Sign in'.
2. Select where to send your PIN code. This can be sent either to your registered mobile number or email address.
3. Select 'Enable' to use your device authentication e.g. facial recognition, fingerprint, or passcode.
4. Push notifications are automatically enabled so you will be notified when documents are shared with you. Select 'Continue' to complete login.*

*Once you have completed setup, you only need to use your face, fingerprint or passcode when accessing your account again.

How to view documents that have been shared with you

- Log in to the app – on the front screen you will see there is a recently shared files section where any documents shared will show. Simply click on an item to open the document.
- If you are logged in to the website, you can access any documents via the Shared Documents tab along the top of the menu bar.

Uploading a document

- Via the app, you simply select the upload icon and follow the on-screen instructions.
- On the website:
 - Click the 'Upload' tab.
 - Select 'Add' and locate your chosen document.
 - Select the destination folder.
 - Click the 'Upload all' button.
 - Once uploaded, refresh the screen and the document will appear in the selected folder.

Managing your personal documents

- Within the app, you can access 'My Folders' where you can file your document. You can upload items by selecting the + button in the bottom right-hand corner.
- On the website, you can click on 'Documents', and here you can add, rename and delete folders/documents as you wish. To share documents back to us, ensure the document is highlighted, select the 'General' tab and then click 'Share'. On the next screen, you can either click 'Share' again or browse for a specific folder in the 'Select the Destination Folder' option.

**If you need any help with any aspects of My Wellesley,
please call us on 01444 244551.**