

MYAVIVA USER GUIDE

FOR AVIVA PLATFORM CUSTOMERS



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AVIVA PLATFORM - PUTTING YOUR PLANS/ POLICIES AT YOUR FINGERTIPS

At Aviva, we like making it easier for our customers. That's why we've created MyAviva. Your online account allows you to view your Aviva plans/policies in one secure and easy to use place, wherever and whenever you want.

MyAviva offers you a host of benefits:

- Check your plan details and documents
- View valuation and investment information
- Safe, secure and easy to use

Working with your financial adviser

Your relationship with your adviser will remain unchanged if you register for MyAviva. MyAviva is designed to make it easier for you to keep track of your investments (and any other policies you have), complementing the support you already have from your financial adviser.

Please note: your MyAviva experience may differ slightly from that shown in this guide, depending on which products you hold.

Register for MyAviva

Already have an account? [Log in](#)

Enter your activation code 

It starts with three letters, for example FST.

[Continue](#)

No activation code?

Don't worry, you can still register.

 You'll need your **policy or plan number** to hand.

[Register without code](#)

By accessing MyAviva you agree to our [terms of use](#).

To understand how we will use your data for this registration, read our [Privacy Notice](#).

HOW TO REGISTER

(page 1 of 3)

Visit aviva.co.uk/register to create your MyAviva account.

You don't need an activation code to register, simply scroll down and click 'Register without code' to proceed.

Step 1: Create a username and password

1

You can register for MyAviva in three simple steps. First, give us your email address, which will act as your username when you log in. Then choose a password.

Find out [how we use your data](#)

Personal email

We recommend using a personal email, not a work one, just in case your circumstances change.

Confirm personal email


This email will be your username next time you log in.

Choose a password

Your password will be case sensitive and must contain

- Minimum 8 characters
- At least 1 number
- Uppercase and lowercase letters

Only get the emails you want from us

 Get the latest Aviva offers, promotions and discounts - all tailored to you. To find out how we handle your data, see our [Privacy Policy](#). You can opt out anytime.

Please select

Yes, please send me these emails | No, don't send me these emails

[Continue](#)

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HOW TO REGISTER

(page 2 of 3)

Fig 1: You'll now need to provide some basic details to set up your account.

The email address and password you enter will be used as your login credentials so please ensure you use your own personal email account.

AVIVA

Step 2: Fill in a few personal details

1

We'll use this information to check what policies and plans you have with us.

First name

Last name

Date of birth

We need this to verify your identity.

DD MM YYYY

Postcode

The postcode we hold for your policy.

[I don't live in the UK or there is a problem with my postcode.](#)

Continue

By accessing MyAviva you agree to our [terms of use](#).
To understand how we will use your data for this registration, read our [Privacy Notice](#).

AVIVA

Step 3: What's your policy or plan number?

2

Almost there, Test! We just need one last thing and then your MyAviva registration is complete.

Policy/plan number

Complete registration now

Where can I find my policy/plan number?

- Home, motor, bike, travel or breakdown insurance
- Life insurance, savings, pension, annuities, equity release, bonds or other investments
- Private medical insurance

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HOW TO REGISTER

(page 3 of 3)

Fig 1: Enter your name, date of birth and postcode to help us find your platform account (and any other Aviva policies you have).

Fig 2: Next, enter your AV account number.

Your AV account number starts with the letters 'AV' followed by a series of numbers. You can find your policy type on your policy documents.

Don't know your AV account number or policy type? Your financial adviser will be able to tell you.

HOW TO LOG IN

If you've already registered for MyAviva, simply log in to see your platform account, alongside any other Aviva policies you have (eg home or car insurance).

How to view your platform account details:

If you can't see your platform account(s) when you log in, you'll be given the option to 'unlock your policies'.

To do this, you'll need to provide some basic information including: your AV account number, National Insurance number and policy type.

Your AV account number starts with the letters 'AV' followed by a series of numbers. This is your new account number which you may have been sent.

Don't know your AV account number or policy type? Your financial adviser will be able to tell you.

If you don't already have an account, you'll need to register – see page 4.

AVIVA

Log in

Username
[Forgot Username](#)
This might be your email address

Remember username

Password
[Forgot Password](#)

Log in

Register for MyAviva

If you haven't viewed any of your policies online before, you'll need to register.

Register

By accessing MyAviva you agree to our [terms of use](#).
To understand how we will use your data for your MyAviva registration, read our [Privacy Notice](#).

1 Total portfolio value* £32,379.76
Value shown above includes values of products bought through an adviser only.

2

Investments bought through an adviser	
ISA Portfolio	
Policy number	AV2421073-002
Fund value*	£10,003.18
	3 Details >
Investment Portfolio	
Policy number	AV2421073-003
Fund value*	£10,001.30
	Details >
Pension Portfolio Pre Retirement	
Policy number	AV2421073-001
Fund value*	£12,375.29
	Details >

*Values shown are the latest available. They are not guaranteed and can go up and down, so you may get back less than the amount invested.

[Can't see a policy?](#)

POLICY OVERVIEW PAGE

Once you've logged in or registered, you'll come to the Your policies page on MyAviva.

This page shows summary information for your platform accounts.

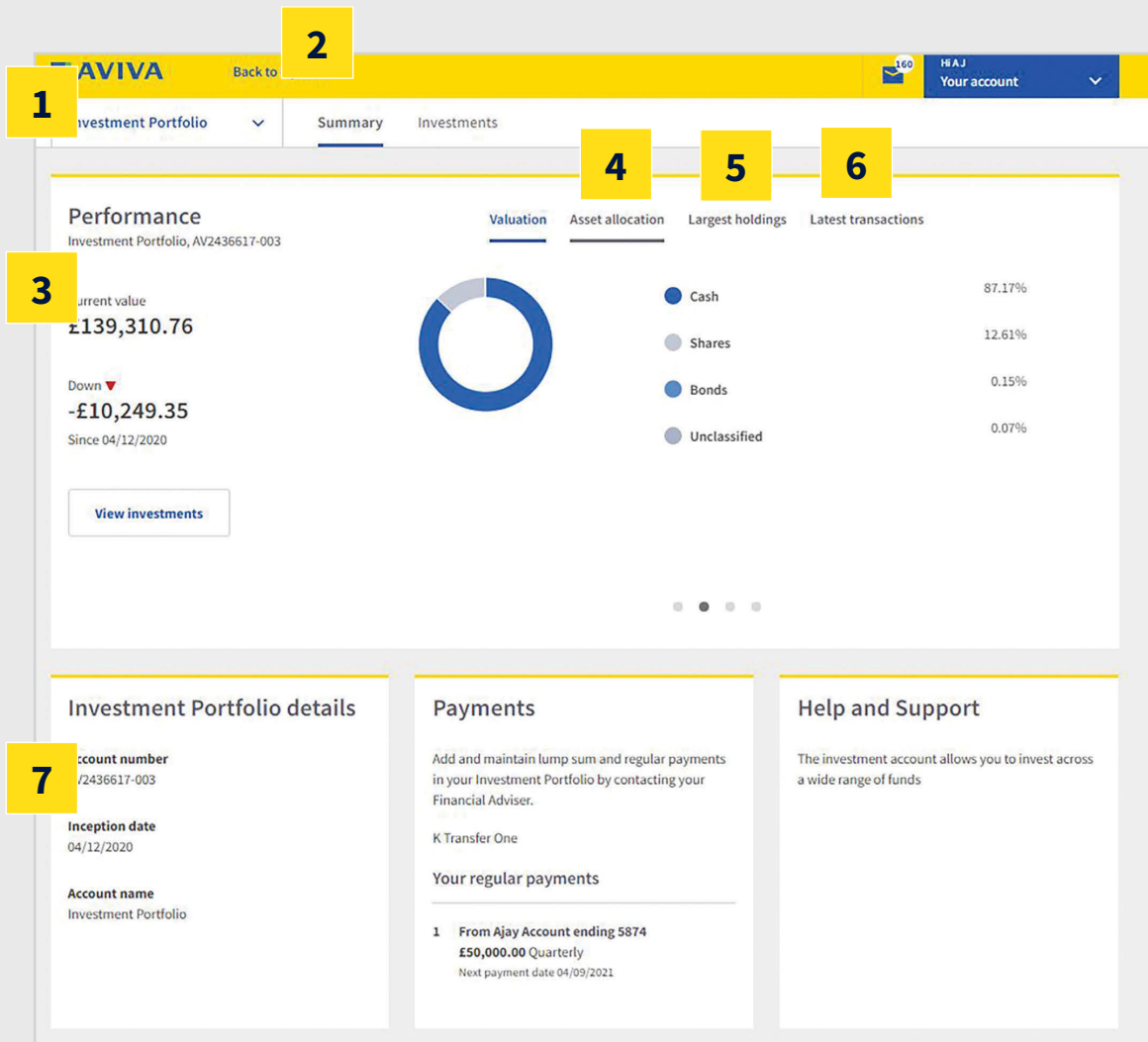
On this page you can see:

- The total value of all your investments with Aviva **(fig 1)**.
- Summary information for each individual platform account **(fig 2)**.

To see more in-depth information, click the 'details' button next to the account you'd like to know more about **(fig 3)**.

PLATFORM ACCOUNT DETAILS

(Summary tab)



Once you've clicked on the 'details' button on the MyAviva landing page, you'll come to this page. It gives you a more in-depth summary of whichever platform account you've selected.

On this page you can:

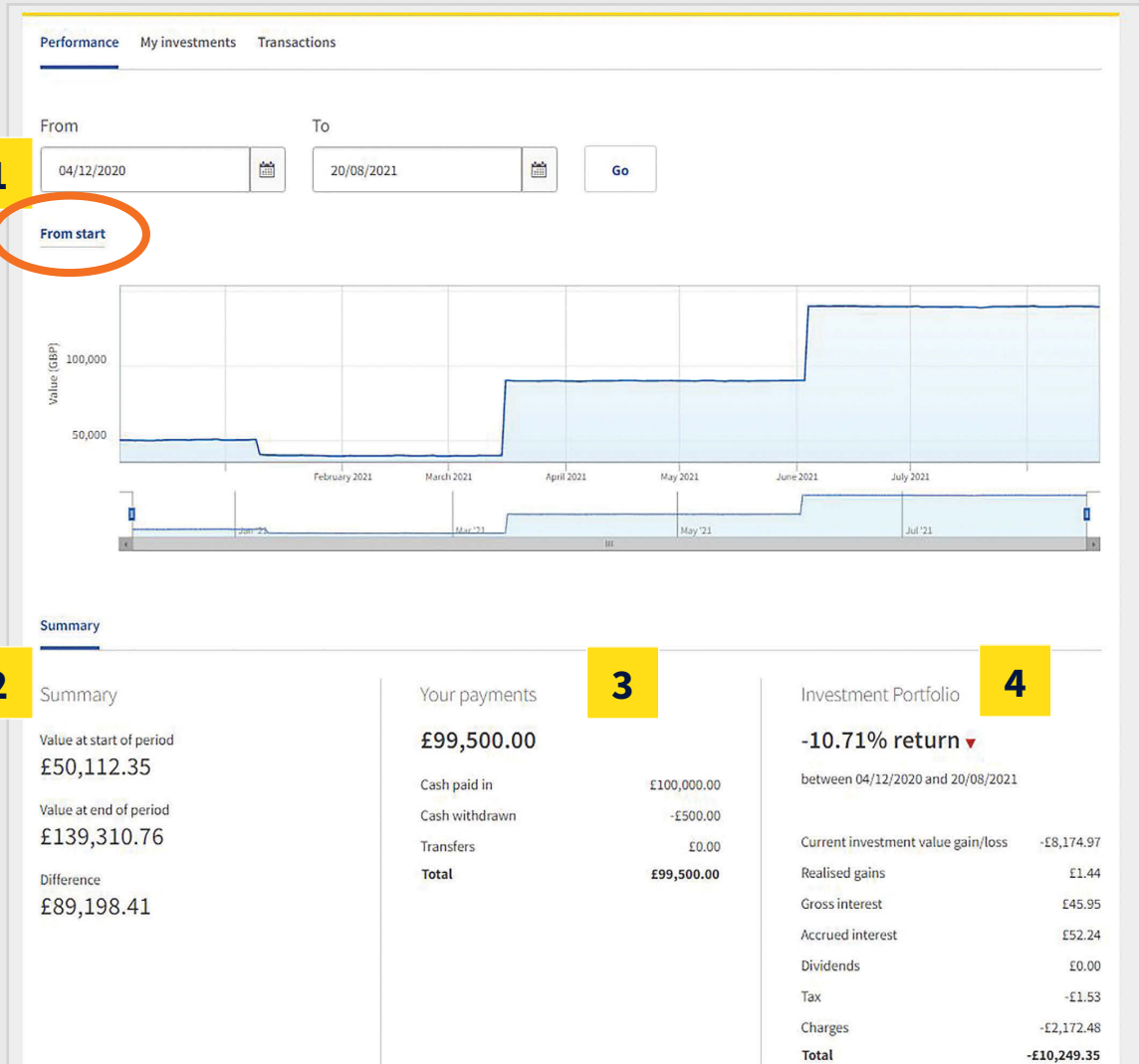
- **Fig 1:** Choose which platform account you want to view from this drop-down menu.
- **Fig 2:** Return to the MyAviva policy overview page using the home button.

The information you'll see may vary, but may include:

- **Fig 3:** Account valuation (current and historic values).
- **Fig 4:** Asset allocation (if any individual assets are held in a model portfolio, these will be grouped for display purposes).
- **Fig 5:** Largest holdings by value.
- **Fig 6:** Latest transactions, such as payments in and out.
- **Fig 7:** Basic platform account details. For ISA Portfolio you will also be able to see your current available tax year allowance.

PLATFORM ACCOUNT DETAILS

(Investments tab)



'Performance'

Here you can find more detailed information about the performance of your platform account, including:

Fig 1: Customisable date ranges for historic performance.

Fig 2: Opening and closing values.

Fig 3: Payments in and out of your account, such as transfers and withdrawals.

Fig 4: Additional performance information.

Investment Portfolio

Value as at 20 August 2021
£139,310.76

Investment Portfolio Summary Investments My options

Performance My investments Transactions

This page shows details of the investments held in your Investment Portfolio. You can click the investment details dropdown for more information on each asset.

As at
20/08/2021 Select **2**

Name	Total cost	Value	Change in value	% of Investment Portfolio
GBP Cash	£107,314.59	£107,314.59	-	77%
Aviva Inv UK Equity Income 2 Acc 1	£14,959.10	£17,590.27	£2,631.17 ▲	13%
Aviva Inv UK Prop Fdr Inc 2 1	£15,000.00	£14,303.40	£-696.60 ▼	10%
miQZ3A9XK 1	£100.00	£102.50	£2.50 ▲	0%
Total	£137,373.69	£139,310.76	£1,937.07 ▲	100.00%

1

3

Aviva Inv UK Equity Income 2 Acc Code: OSNYGB

View price
1 month Go

In your portfolio
As at 20 August 2021

Units held	8,764.8130
Held in	ISA Portfolio Investment Portfolio
Total cost	£17,959.10
Average cost per unit	£2.05
Current price *	£2.41
Current value *	£21,117.94
Change	£3,158.84

Fund Factsheet

PLATFORM ACCOUNT DETAILS

(Investments tab - continued)

‘My investments’

Here you can see more detailed information about the assets you’re invested in, including:

- **Fig1:** Assets currently held, and historic assets held
- **Fig 2:** Cost, value, and percentage holdings for each asset

For details about a particular investment (including fund factsheets), use the drop down menu **(fig 3)**.

PLATFORM ACCOUNT DETAILS

(Investments tab - continued)

‘Transactions’

Here you can see details of any transactions that have been made by your platform account (fig 1).

Investment Portfolio
Value as at 20 August 2021
£139,310.76

Investment Portfolio Summary **Investments** 1 My options

Performance My investments **Transactions**

You can change the transaction table view below by choosing from the different transaction view options (Investments, Cash or Transfers).

Investment transactions **Cash transactions** Transfers

From 01/08/2021 Until 20/08/2021 Go 3m 6m YTD All

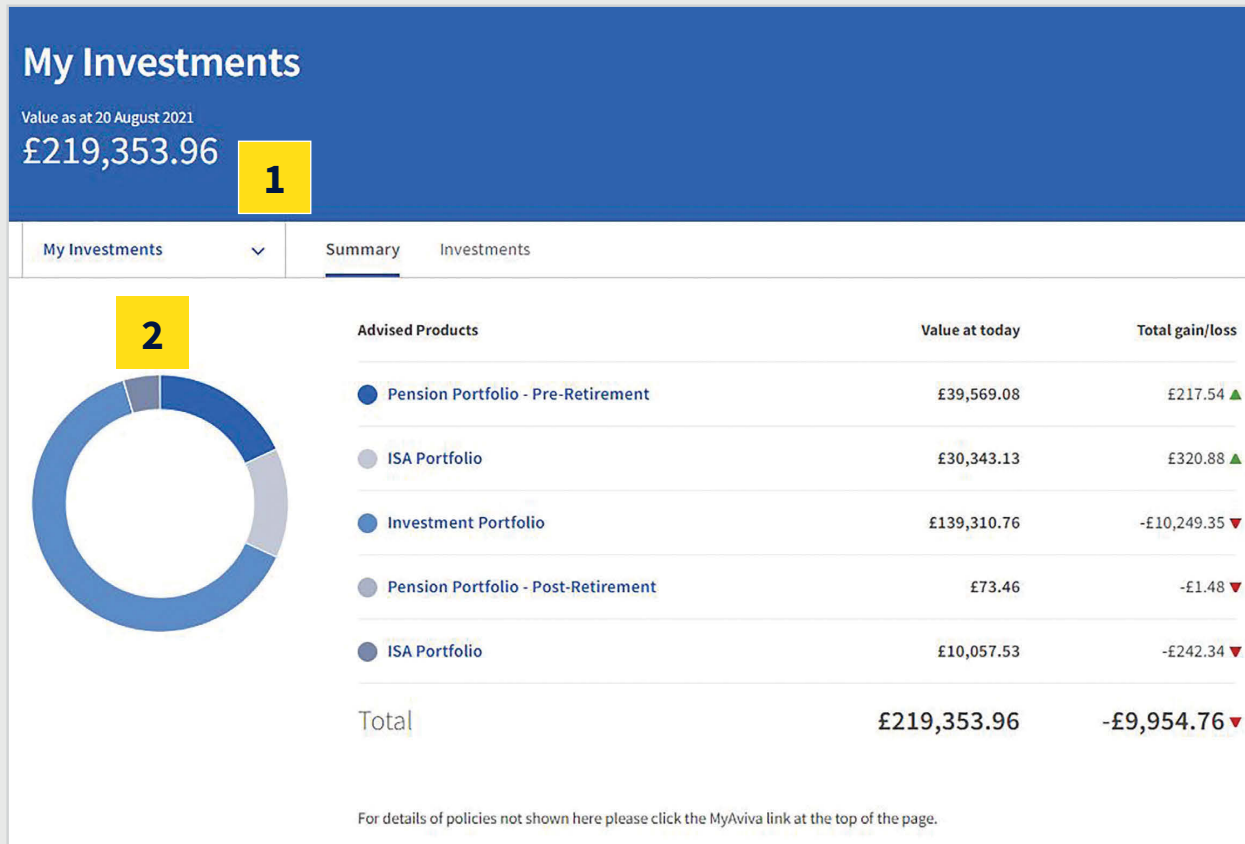
Details	Date	Paid in	Paid out	Cash balance
Aviva Charge, Investment Portfolio for the period 05-Jul-2021 to 04-Aug-2021	04/08/2021		-£278.48	£107,314.59
Ongoing Adviser Charge, Investment Portfolio for the period 05-Jul-2021 to 04-Aug-2021	04/08/2021		-£236.40	£107,593.07
Cash Interest	02/08/2021	£22.90		£107,829.47

MY INVESTMENTS

(Summary tab)

You can see an overview of all your platform accounts by selecting 'my investments' from the drop-down menu (**fig 1**).

The value of each of your platform accounts is shown individually and as a percentage of your overall platform portfolio (**fig 2**).

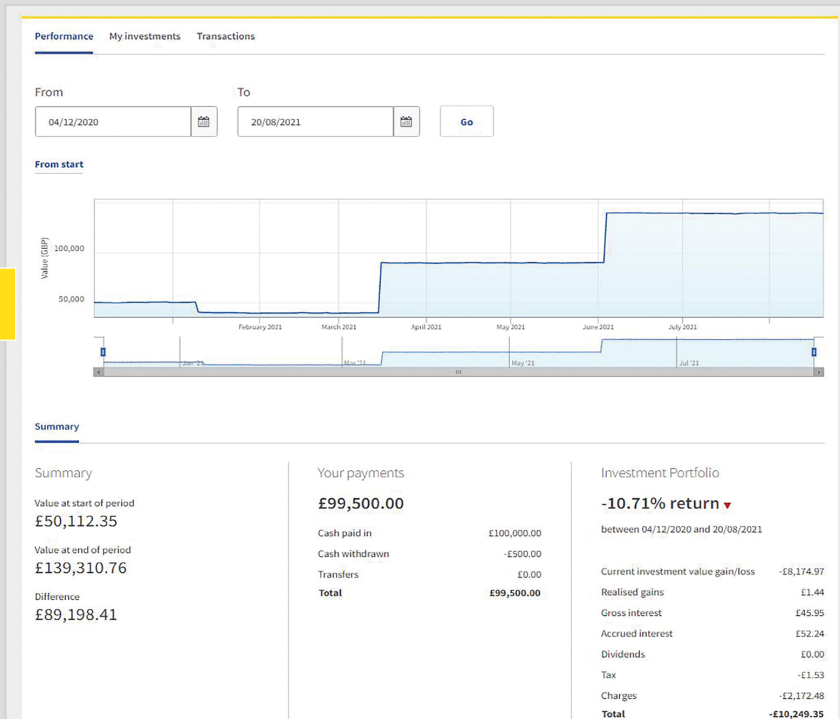


MY INVESTMENTS

(Investments tab)

On this screen you can see detailed performance information (**fig 1**) and detailed investment information (**fig 2**) for all of your platform investments.

1



2

Investment Portfolio

Value as at 20 August 2021
£139,310.76

Investment Portfolio | Summary | **Investments** | My options

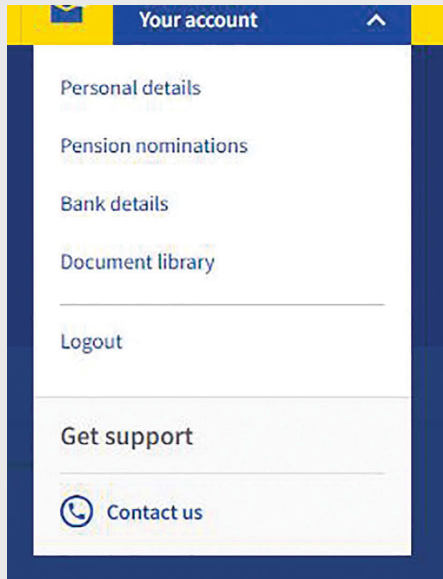
Performance | My investments | Transactions

This page shows details of the investments held in your Investment Portfolio. You can click the investment details dropdown for more information on each asset.

As at 20/08/2021

Name	Total cost	Value	Change in value	% of Investment Portfolio
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Aviva Inv UK Prop Fdr Inc 2	£15,000.00	£14,303.40	-£696.60 ▼	10%
mQ23A9XK	£100.00	£102.50	£2.50 ▲	0%
Total	£137,373.69	£139,310.76	£1,937.07 ▲	100.00%

VIEW YOUR PERSONAL DETAILS



Using the drop-down menu in the top right of any screen, you can view:

- The personal details we hold for you, such as your address and contact details.
- The bank details we hold for you, which we use for any payments or withdrawals to/from your platform account.
- Electronic copies of any correspondence and key documents in the document library.

GLOSSARY

Here are some of the terms you might come across while looking at your Aviva Platform account(s) in MyAviva.

Asset: what you are invested in, for example cash or individual funds

Allocation: where your money is being invested, for example an asset or as cash

AV account number: your Aviva Platform account number. This starts with AV followed by a series of numbers

Holding: the name of an asset

Model portfolio: a grouping of assets that has been set up for you by your financial adviser

Payments in: payments made into your Aviva Platform accounts, for example regular or one-off contributions

Payments out: payments out of your Aviva Platform accounts, for example income paid or withdrawals

Platform portfolio: if you have multiple Aviva Platform accounts, for example an Investment Portfolio and an ISA Portfolio, these will be grouped into your Platform portfolio

Account type: the type of policy you hold, for example Investment Portfolio

Transfer: any cash or asset transferred into or out of your Aviva Platform accounts

Valuation: the value of your holdings on the valuation date

If you have any trouble registering for MyAviva please contact **0808 101 0860** or email **myaccount@mail.online.aviva.co.uk**

For any help understanding your investments and investment options, please contact your financial adviser.

Need this in a different format?

Please get in touch with your usual Aviva contact if you would prefer this document, **EX03107**, in large print, braille or as audio.



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