

A clear, uncomplicated view of your finances in one place. Your investments, savings, pensions, insurances, bank accounts, credit cards, store cards, mortgages, loans and property alongside all the associated paperwork.

On your desktop and as an app on your tablet and smart phone, your finances are beautifully brought together under a single login accessible to you at any time, wherever you are.





With TheWealthHub you can



View your investment portfolio



Manage your income and spending



Quickly access your insurance details



Safely store all your important documents

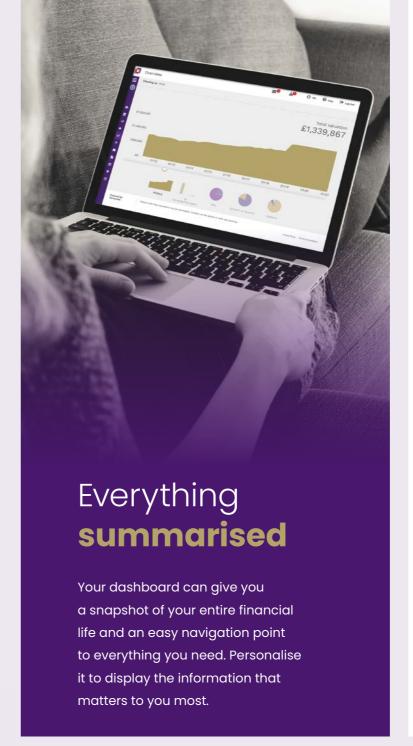


Track your property values



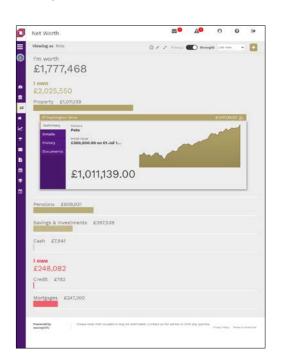
Be reminded about your renewals, income and payments





Keep track of your investments

TheWealthHub makes it easy to see how your investments, where possible, are doing. Valuations are updated daily and build into a history across your entire portfolio.



Your personal **financial assistant**

payments, income and maturities.

Add your own key events such as MOTs, road tax and HMRC payments.

Keep your important documents safe



Store all your paperwork including wills, property deeds, insurance contracts, policy documents, valuations and statements.

TheWealthHub keeps your important financial documents safe, secure and accessible.

Your adviser can share documents and reports with you so you can read them when it's convenient. Simply log in to **TheWealthHub** from any device and your important financial documents will be there waiting for you.

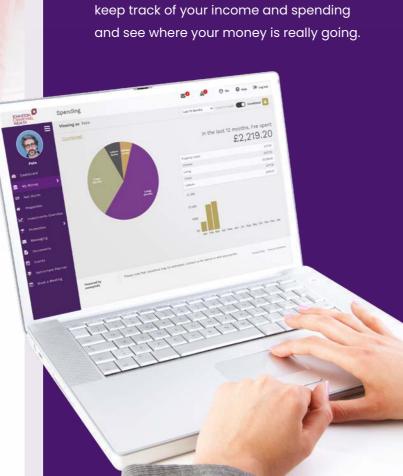
A true picture of your net worth

TheWealthHub tracks the value of your assets and liabilities over time. For you, your partner, your dependants, your trusts, your companies: all brought together into a single view.



See where your money goes

Access your bank accounts, credit cards and store cards together under one secure login. **TheWealthHub** helps you keep track of your income and spending and see where your money is really going



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Access your insurances when you need them

Your policy details are stored next to the things they relate to. Your home insurance next to your home, your car insurance next to your car. **TheWealthHub** reassures you that in the event of an emergency you can access the information you need quickly and easily.

Your property valued

Want to know what your home is worth?
Enter your house number and postcode
and **TheWealthHub** will display your
property details and track its value using
Land Registry data.

Secure and timely communications

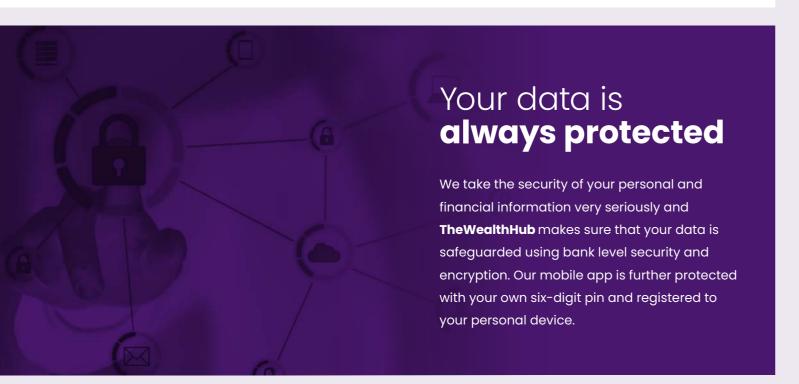
TheWealthHub ensures that your personal data is exchanged using only the most secure methods. Notifications alert you wher important messages or documents are waiting to be read.



Enhanced privacy controls

Our privacy controls allow you to decide who your information is shared with, for example your partner or your adviser. Set your privacy defaults when you first log in and easily change this for individual financial items you add to your account. **TheWealthHub** ensures that you are always in control of your data.





And finally, for your **peace of mind**

If an emergency situation arises, where will the important details about your assets, liabilities, property and insurances be found?

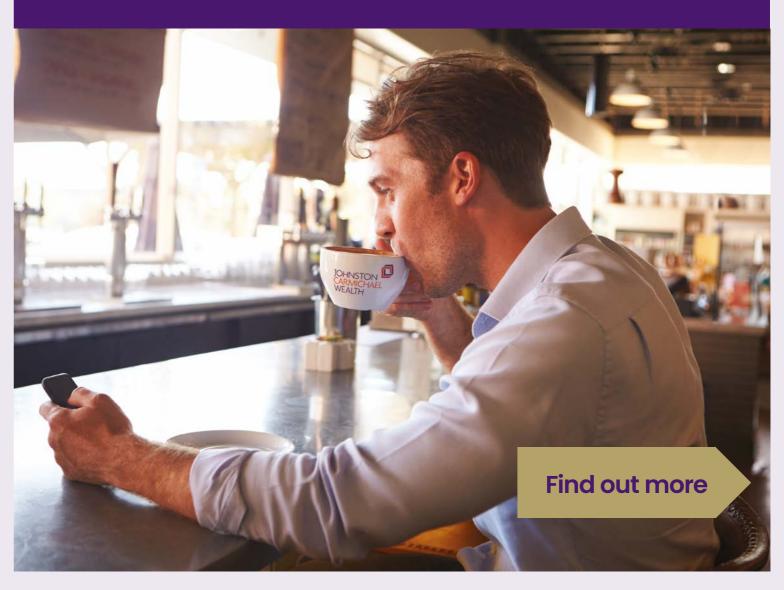
TheWealthHub brings all this information together in one place with all the associated paperwork, making it accessible should it be needed.

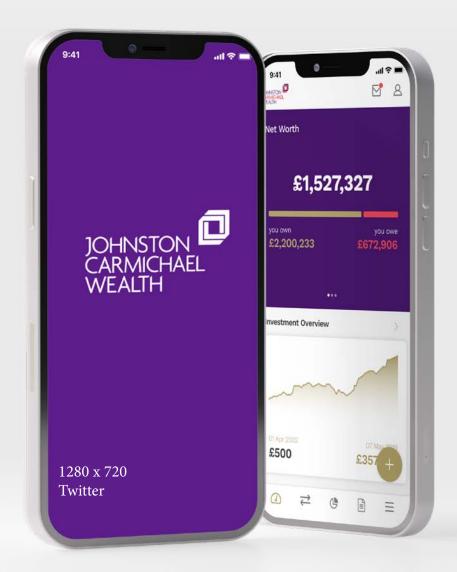




Putting you in control of your finances

- Your personal digital filing cabinet with all your finances organised and updated.
- It's financial peace of mind in your pocket, knowing that your most valuable records are safe and accessible.
- No need to log on to multiple financial sites, helping to reduce the risk of online fraud.
- Keep all of your financial records together and easily track your income and expenditure.
- Access your information when you need it from any device.





Access your online portal today johnstoncarmichael.moneyinfo.co.uk



Email jcw.client-liaison@jcwealth.co.uk

jcwealth.co.uk Visit







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