



FAQs

Frequently Asked Questions

HFMC WEALTH
connect

Frequently asked questions

1 General Questions

Why should I use HFMC Connect?

HFMC Connect is an online portal we are developing exclusively for our clients to provide a clear, uncomplicated view of your finances in one place. HFMC Connect provides an easily accessible digital filing cabinet available on your desktop and as an app on your tablet or smartphone.

Here you can store all your paperwork including wills, property deeds, insurance contracts, policy documents, valuations and statements as well as an In Case of Emergency file. HFMC Connect will keep your important financial documents secure and safe in one place. We can additionally share documents and reports with you so you can read them when it is convenient.

Further features are under test with some existing clients and we will update you, as and when, these become available to use.

I cannot remember my login details, what can I do?

If you have forgotten your login details, go to the login page of <https://Connect.hfmcwealth.com> and click on the 'Problems logging in?' link. Here you'll find options to reset your password or your username.

You'll need to enter your username to reset your password or your email address to request your username. Once the information you enter has been validated, an email will be sent to you containing either a link allowing you to validate yourself by responding to security questions and then to reset your password, or details of your username. Once you have logged in to HFMC Connect you can amend your username, password or security questions by clicking on the 'Me' icon.

2 Security

How secure is it?

We understand that we are dealing with sensitive financial information and that's why we take data protection and security so seriously. HFMC Connect uses data encryption and other security measures to ensure that your data is protected at all times.

Here's the technical bit...

All information is securely transmitted using SSL standard encryption, which creates an encrypted connection between your browser and the servers. Your information remains encrypted at all times. The servers are protected with firewalls which prevent unauthorised access to the servers and are monitored 24/7. Transaction information is stored on servers located in a secure 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. Security personnel monitor the system 7 days a week, 24 hours a day and access requires multiple levels of authentication, including biometrics (fingerprint/eye scans) procedures.

How private is my data?

All of your data belongs to you and sensitive account information is completely private so that only you can see it. We don't store banking user names, passwords or any other account information. 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 HFMC Connect you can decide who it is shared with using HFMC Connect's privacy controls. This means that you are in control of whether HFMC Wealth can see any documents, plans or accounts which you add yourself.

What is the benefit of using HFMC Connect for documents?

HFMC Connect allows you and your adviser team to upload and store PDF documents. All documents are virus checked and then encrypted before they are stored on the servers. All documents remain encrypted at all times, a document is only decrypted as you download it.

Is my data protected under the data protection act?

HFMC Wealth strictly adheres to the General Data Protection Regulation and the Data Protection Act (DPA 2018), so you can be assured that any data or documents 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 or we are required to do so by law.

What happens to my data if I no longer use HFMC Connect?

Should you stop using HFMC Connect all of your personal and financial data, along with any documents stored are completely deleted from the servers. You have the option to download all of your data and documents in the My Data area which you can access via the 'Me' icon.

3 Using HFMC Connect

Documents

How do I add a document to HFMC Connect?

Only pdf documents can be stored on HFMC Connect. To add a pdf to HFMC Connect select 'Documents' from the menu list or dashboard and decide which folder you would like to store the document. Click the more detail arrow to the right of the folder title and select 'upload'. This will open a browser dialogue box and you can select the pdf document and click 'open'. You then have the opportunity to rename the file if required.

How do I delete a document on HFMC Connect?

If you would like to delete a document, select 'Documents' from the menu list or dashboard and locate the document you wish to remove. Select the document by clicking on the title. Options to remove, rename or move the document will appear. Select 'Remove' and 'Yes' to delete the document.

How do I move a document from one folder to another on HFMC Connect?

If you would like to move a document into an alternative folder, select 'Documents' from the menu list or dashboard and locate the document you wish to move. Select the document by clicking on the title. Options to remove, rename or move the document will appear. Select 'Move' and choose the appropriate folder from the list that appears. Click 'OK' to move the document.

How do I create more folders in HFMC Connect?

If you would like to create a new folder within the Documents area, select 'Documents' from the menu list or dashboard. Click on the additional icon above the list of existing folders. You can type the folder title and click save.

How will I know if my HFMC team has added a document to my HFMC Connect account?

When HFMC upload any document to your HFMC Connect account an email is sent to your email address stored on HFMC Connect. The email will include the name of the document.

Will my HFMC team know if I have added a document to my HFMC Connect account?

When you upload a document to your HFMC Connect account HFMC will not be notified. If you would like your HFMC team to view a document, ensure you have allowed them visibility through the privacy setting and contact them in the usual way (a lot of clients use email).

How do I share a document with my partner or my HFMC team?

To allow other HFMC Connect users and/or HFMC to view documents you have added to your account you will need to log-on to the desktop version of HFMC Connect. Click on the 'Me' icon and select 'settings'. Select 'My privacy settings' from the list now displayed. Display options using the more details arrow to the right of 'HFMC Connect'. Tick any of the options listed to allow visibility to items you add onto HFMC Connect. This is setting the default view, but you may set individual privacy settings for any item you add by clicking the padlock icon next to the folder or the individual document.

My Settings (available on the desktop)

How do I change my email address on HFMC Connect?

To change the email address, click on the 'Me' icon and select 'settings'. Select 'Change email' from the list now displayed. Enter your new email address and your password.

How do I change my privacy settings?

To change your privacy settings, click on the 'Me' icon and select 'settings'. Select 'My privacy settings' from the list now displayed. Display options using the more details arrow to the right of 'HFMC Connect'. Tick any of the options listed to allow visibility to items you add onto HFMC Connect. This is setting the default view, but you may set individual privacy settings for any item you add.

How do I change my default view?

The default view is your own information only. If you have a linked HFMC Connect account, you have the option to view a combined view. To change the default view, click on the 'Me' icon and select 'settings'. Select 'My views' from the list now displayed. Choose the display option from the list now displayed by clicking on the more details arrow to the right of the option name. Here if you wish you can 'Set as default' and 'Rename' a combined view to what you may feel is a more user-friendly option. Two first names is a popular option.

I have a query regarding the information being displayed in HFMC Connect who do I contact?

In the first instance, all queries regarding the information being displayed in HFMC Connect should be referred to your HFMC team.

These FAQs should be read in conjunction with the T&Cs and Privacy Policy.



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