

This is just for UK advisers – it's not for use with clients.

Get the most from our secure online services for onshore bonds

Manage your client business online quickly and efficiently

Here's some of the things you can do online:

- **Submit and track applications** easily to save time.
- **Take money out of a bond** by requesting a full or partial withdrawal (where available).
- **Access key documents** all in one place. View, download or print copies – they'll be on hand when they're needed.
- **Manage your client's plan** where you'll find a list of all the actions you can do online, depending on the products they have. You can do things like notify us of a death, switch funds or top-up.
- **Request illustrations and valuations** when you and your clients want them.
- **Access a range of useful tools and calculators** to help you explore options and identify those that are right for your clients.
- **Update your client's personal details** such as their address, email and phone number (if you have servicing rights).



Accessing our online services

To log in to our online services go to mandg.com/pru/adviser/online-services

Step 1 Log in using your secure third party portal provider details. You can do this using an existing account with Unipass Certificate, Unipass Identity, Assureweb or Iress Exchange. If you don't have an account, please use the details below to set one up.

Step 2 You'll need your Prudential agency number for each relevant product to start using the services you have access to.

If you don't have an existing Prudential agency number, you can apply for agency registration on the Unipass by Origo website. Visit mandg.com/pru/adviser/online-services/help/agency-registration for more information.

Unipass by Origo

To register for a Unipass ID, go to unipass.co.uk

Assureweb an iPipeline product

For Assureweb queries, visit uk.ipipeline.com/ipipeline-portal

Iress Exchange

For Iress Exchange queries, visit iress.com

Making it easy to do more online

We offer a range of online services for our onshore bonds to make it even easier to do business with us:



What can be done online?

Create illustrations	Submit business	Withdrawals
<ul style="list-style-type: none"> • Single owner on own life • Single owner on life of another • Joint owner on own life • Joint owner on lives of another • Corporate investments • Will Trust • Loan Trust • Gift Trust • Cases under £5m • Existing trusts 	<ul style="list-style-type: none"> • Single owner on own life • Joint owner on own life • Single owner on own life and another • Cases under £5m 	<ul style="list-style-type: none"> • Full withdrawals • Partial withdrawals – minimum £50 • Full segments • Partial segments • Combination of full and part segments • Cheque or BACS payment • Withdrawals up to £250,000 • Chargeable gain calculation



What has to be done offline?

Create illustrations	Submit business	Withdrawals
<ul style="list-style-type: none"> • Discounted Gift Trusts • Cases over £5m 	<ul style="list-style-type: none"> • Power of Attorney • Anything set up under trust • Life of another policy • Corporate investments 	<ul style="list-style-type: none"> • Regular withdrawals • Withdrawals over £250,000 • Any policy that has been sliced • Clients not residing in the UK • Bonds in trust or assigned • Where a Power of Attorney is in place • Bonds in joint names where the owners live at different addresses, and when the money is to be paid to a sole bank account • Payment from a jointly owned policy into a single bank account • Corporate investment withdrawals

Get in touch with us easily if you need to

Contact us by live chat or sending a secure message by logging in to the online services at mandg.com/pru/adviser/online-services



Live chat

- You'll see the Live Chat icon on your screen when it's available.
- Chat with one of our agents.
- They'll answer any queries you have or point you in the right direction.
- It's available Monday to Friday 08:30 – 18:00.



Secure message

- Ask us anything you'd normally request over the phone.
- Send us important documents and information through our secure channel, it's faster than the post.
- Check secure messages you've sent and received on the 'Message notifications' dashboard.
- It's available 24/7 and no waiting in a phone queue.

Need some help?

If you need support on accessing and using the PruAdviser or online services websites, contact the PruAdviser Helpdesk at pruadviser.helpdesk@prudential.co.uk or call **0808 234 5200**. Lines are open Monday to Friday 09:00 – 17:00.

pruadviser.co.uk

'Prudential' is a trading name of Prudential Distribution Limited. Prudential Distribution Limited is registered in Scotland. Registered office at 5 Central Way, Kildean Business Park, Stirling FK8 1FT. Registered number SC212640 Authorised and regulated by the Financial Conduct Authority.