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

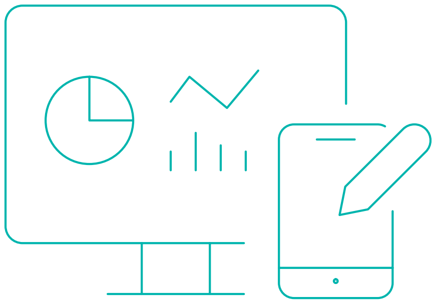
Pru
part of M&G plc

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 (you can also submit green items online)	Submit business	Withdrawals
• Single owner on own life • Single owner on life of another • Joint owner on own life • Joint owner on lives of another • Company investments • Will Trust • Loan Trust • Gift Trust • Cases under £5m • Life assured under age 18	• Submit standard applications without a client signature or email them • Submit adviser declarations without an adviser signature or email them • Send client verification information – no original copies are required • Trusts still need wet settlor and witness signatures, but trust documents can be submitted by email	• Full withdrawals • Partial withdrawals – minimum £50 • Full segments • Partial segments • Combination of full and part segments • No need for client signature • Cheque or BACS payment • BACS withdrawals up to £250,000 and cheque withdrawals up to £100,000

What has to be done offline?

Create illustrations	Submit business	Withdrawals
• Discounted Gift Trusts • Cases over £5m	• Power of Attorney • Anything set up under trust • Anything under assignment • Any policy that has been sliced • Life of another policy • Corporate investments	• Regular withdrawals • Cheque payments over £100k or BACS payments over £250k • Clients not residing in the UK • Bonds in trust or assigned in the past 12 months • Where a Power of Attorney is in place • Bonds in joint names where the owners live at different addresses, or when the money is to be paid to a sole bank account • Chargeable gains calculations in some circumstances

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 09:00 – 17:00.

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.

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