My Later Life
Equity planning for your later years

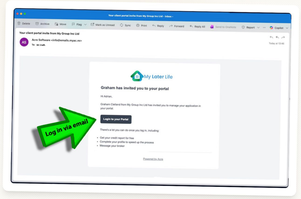
GUIDE

User Guide to Your Portal

Welcome to the My Later Life secure encrypted Client Portal. This guide is designed to help you navigate the features and ensure your documents are uploaded safely and efficiently. Our portal uses bank-level security to protect your sensitive information, giving you peace of mind as you plan for your future.

1 Where to access your Portal Service

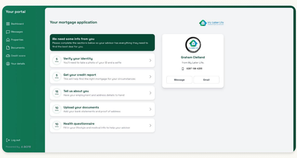
You will receive an email invitation to join the portal. This email contains a unique link specifically for you. Please check your inbox (and spam folder) for an email from My Later Life.



Authentication: For your security, the portal uses Multi-Factor Authentication. You will need to verify your identity using a code sent to your mobile phone or email during the login process.

2 Accessing the Portal

Once authenticated, you will be taken to your dashboard. This is the central hub for all your interactions with us.



3 Document Upload

- Securely upload requested documents directly to your file.
- View the status of your uploaded documents.
- Receive notifications when we have reviewed your submissions.

BEST PRACTICES

Scanning Guide

Recommended Scanning Apps

Using a dedicated scanning app ensures documents are legible and professional. Here are helpful tutorials:

Adobe Scan
https://www.youtube.com/watch?v=Qxxn4InGoMc

Apple Notes
https://www.youtube.com/watch?v=sohlhjnt3uc

Google Drive
https://www.youtube.com/watch?v=jCztHNNv3yY

Important Setup & Scanning Tips

Lighting: Ensure good lighting. Natural daylight is best. Avoid shadows falling across the document.

Background: Place the document on a contrasting background (e.g., white paper on a dark table) so the app can detect edges.

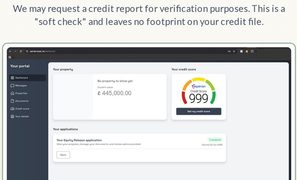
Steadiness: Hold your phone steady directly above the document to avoid distortion.

Review: Always check the scan before uploading to ensure text is clear and readable.

Credit Report Information

This won't affect your credit score

We may request a credit report for verification purposes. This is a "soft check" and leaves no footprint on your credit file.



If you need any help Call 0207 100 4255

My Later Life
Equity planning for your later years