

Westerby Online Legal Policy

I am a member. How do I register to access my SIPP information online?

To register to view your SIPP information online you will need your member reference and email address. You will also be asked to supply a web user name (minimum of eight characters long) and a security question and answer that only you will know e.g. Name of your favourite teacher at primary school).

When you have this information you can complete the Member Registration page. Once this has been successfully completed you will be emailed your password. Please reset your password immediately using the Password Reset link on the Members and Advisers Login page. You will need to choose a password using the password rules described below. Please follow the instruction in the email.

If you are unsure of any of the above or have problems registering please contact your adviser.

What are the rules for choosing a password?

For confidentiality reasons and to ensure that there is not unauthorised access to your SIPP information by other people using password guessing etc, we require a strong password. Your password is required to be a minimum of 10 characters long with a minimum of one non-alphanumeric character (!@#\$%^&* /). Your password is case sensitive i.e. you will have to enter it in exactly the same combination of upper and lower case characters you used when set up your password.

Acceptable password: @Freddie1967

Invalid password: AlexSmith

I am an adviser. How do I register to access my client's SIPP information online?

Please contact us so you can be authorised to access your client's SIPP information online. You will need to supply us with a web user name, password (see password rules above), email address and security question/answer.

What do I do if I forget my password?

If you forget your password you can request a password reset from the Member and Adviser Logon page. You will need your web user name and security answer. Once these have been entered and checked you will be email a link to reset your password.

What do I do if I forget my web name or security answer?

Please contact your adviser if you forget your web user name or security answer.

What do I do if my web user account is locked?

If you or someone else attempts to login to your website account and fails to provide the correct password more than five times your account will be locked and access to your account will be denied. If this happens you can use the password reset request link on the Member and Adviser Login page to reset your password.

You will be asked to enter your web user name and security answer. Once these have been entered correctly you will be emailed a link to reset your password. Please follow the instructions in the email.

Is my information secure?

The web site uses secure (https) pages and all personal and financial data is encrypted between the web server and your browser. Look for the secure padlock icon in your browser window.

All personal and financial data is encrypted when data is uploaded from our internal systems to the web server.

A strong password is required to access the website.

Your web session will be automatically ended after 20 minutes if you do not make any new page request.

How Are Cookies used by the website?

An encrypted cookie is used to store a session identifier when a member or adviser logs in to the website. This cookie contains no personal data. The cookie is destroyed when a member logs out of the website or there is no use by the logged in user of the website for more than 20 minutes. No information apart from the date/time a user last accessed the site is stored by the website.

By registering to use this website a member or adviser consents to allow a session cookie to be stored on their computer.

Members should contact their adviser if in doubt.