

# Client guide

# Setting up your account

It only takes a few simple steps to get started on the AJ Bell Touch app. Here's how it works.

- ① When your adviser has registered you as a user, you'll receive a welcome email from AJ Bell Touch inviting you to download the app and complete the setup of your account.
- ② Once you've downloaded the app, you can review and accept the Terms and Conditions, Key Features and Privacy Policy.
- ③ You'll then be asked to create a six-digit security personal identification number (PIN).

## Welcome to AJ Bell Touch

Dear Christian Family

Your financial adviser has created an application for you on Touch by AJ Bell. Please follow the steps below on your mobile device to complete the process.

### Step 1

Download the Touch app in one of the following ways:



### Step 2

Tap 'Register' to set up your account.

[Register](#)

Yours,  
The AJ Bell Touch Team



### 2 Push notifications.

Make sure push notifications are enabled on your mobile device to receive the latest updates from your adviser and Touch.

**Confidentiality notice:** This email and any accompanying documents contain confidential information intended for a specific individual or company. This information is private and protected by law. If you are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or the taking of any action based on the contents of this information, are strictly prohibited. You are also requested to advise us immediately if you receive information not addressed to you. We may use a device called a web beacon in some emails. Please refer to our Legal Policy for further details, including how to switch them off.

**Liability notice:** We make every effort to keep our network free from viruses. You should, however, check this email and any attachments to it for viruses, as we can take no responsibility for any virus that may be transferred by way of this email.

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You'll need your six-digit PIN to do certain transactions, like setting up monthly payments into the account. The app won't let you choose a PIN that's easy to guess – for example one that contains the same digit multiple times, like '111111'.

- 4 Next, we'll send a separate six-digit authentication code to your phone by text message. You'll need this in order to complete the app set up process.

**You must make sure you enable notifications for the app – otherwise, you will miss important notifications from your adviser, which could delay any instructions.**

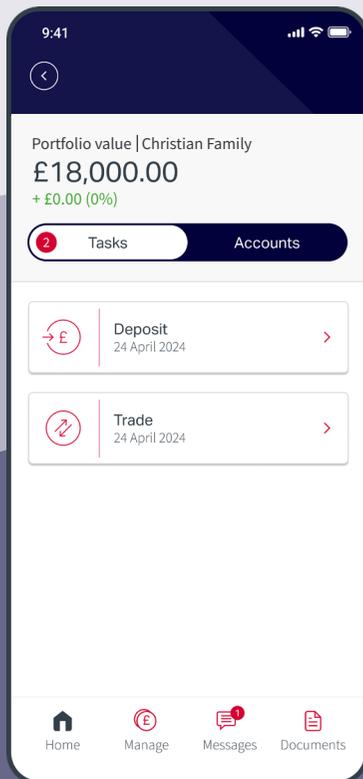
You'll be prompted to enable notifications when you download the app – please be sure to do so. You can check your notification settings at any time via your device's settings.

- 5 Once the account has been set up, you can provide any additional information we need that your adviser didn't have, such as your National Insurance Number.
- 6 You will also need to upload identity documentation, such as a driving licence or passport, and complete video-based checks so that we can fully verify your identity.
- 7 We'll verify your identity using all the information that you've provided. Once that's done, you'll receive a notification from the app, and can log in to complete the final steps.
- 8 You'll then be asked to add your bank account details directly through the app. These will be validated instantly with your bank through the banking industry's "open banking" connection. Your account is now fully activated!

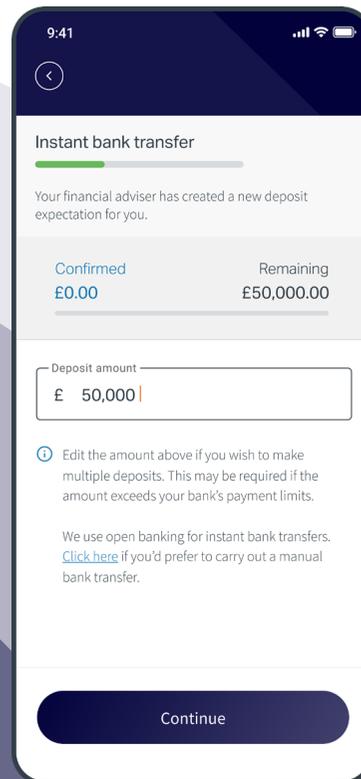
# Using your account

Using the AJ Bell Touch app couldn't be simpler.

The app will always open on 'Tasks' if there are any for you to complete. Otherwise, it'll open on 'Accounts'.



- When your adviser submits an instruction, you'll receive a push notification on your smart device. You can then log into the app to review it. If you're happy to proceed, just tap 'Continue' to authorise the instruction, and it will be processed automatically.



- If you have any queries or requests, you can contact your adviser via the app whenever you like. Just use the secure message function.
- Any reports, proposals, records of deals and important information like Terms and Conditions will all be kept in the app's documents store. You can access this any time you want to review a given document.



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