



Options UK Online Portal SIPP Client Guide

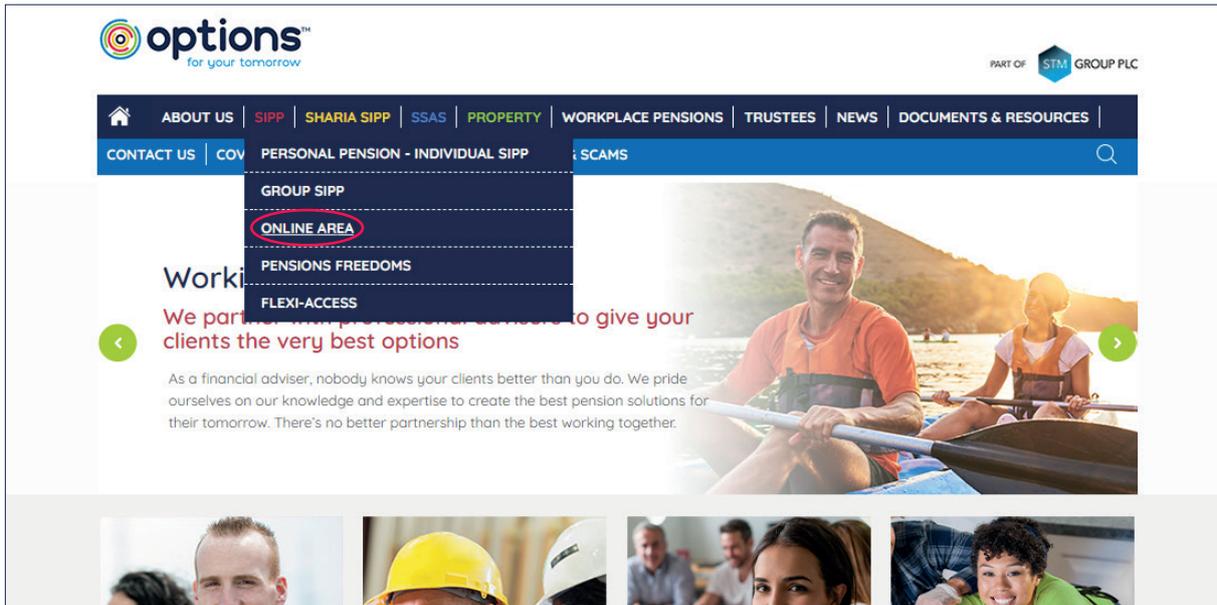
Options UK Online Portal

SIPP Client Guide

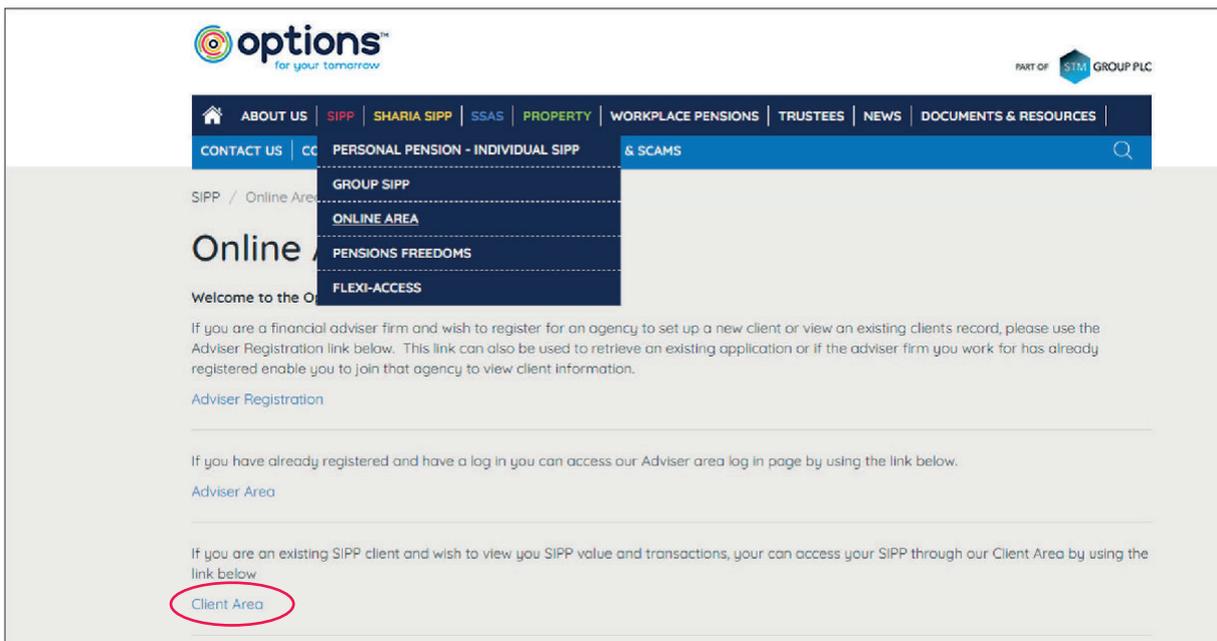
Accessing your SIPP Information online is easy. Just follow these steps.

Step 1 – Online Access

Go to our Options UK website <https://www.optionspensions.co.uk/>, click on **SIPP** at the top and select “**ONLINE AREA**” in the drop-down list, or just use this link: <https://www.optionspensions.co.uk/online-area>

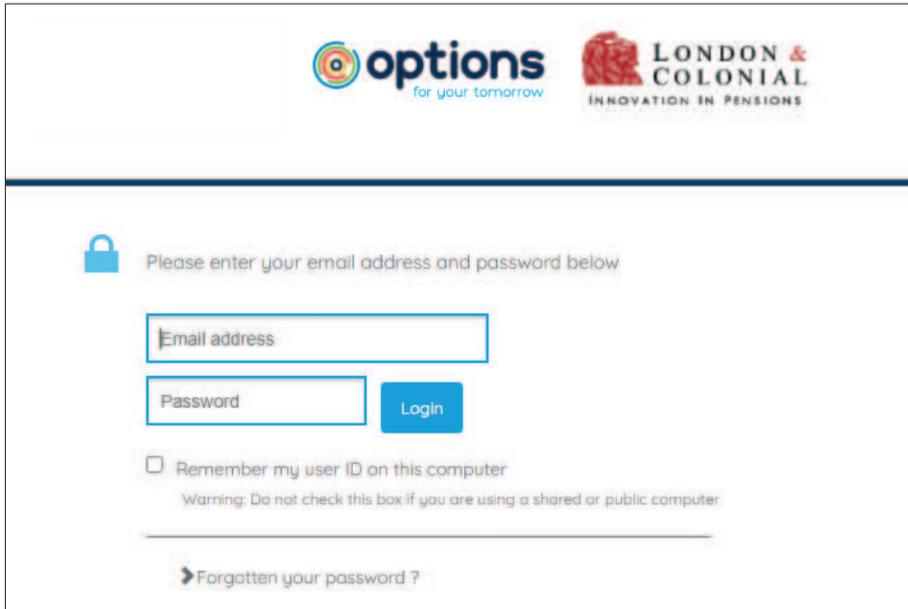


Once in the Online Area, please click on Client Area or use this link: <https://portal.stmgroupltd.com/client-area/> It will take you direct to our Client Area.



Step 1 – Online Access (Continued)

In the Client Area, you will be asked to log in with your email address and password.



Please enter your email address and password below

Email address

Password

Login

Remember my user ID on this computer

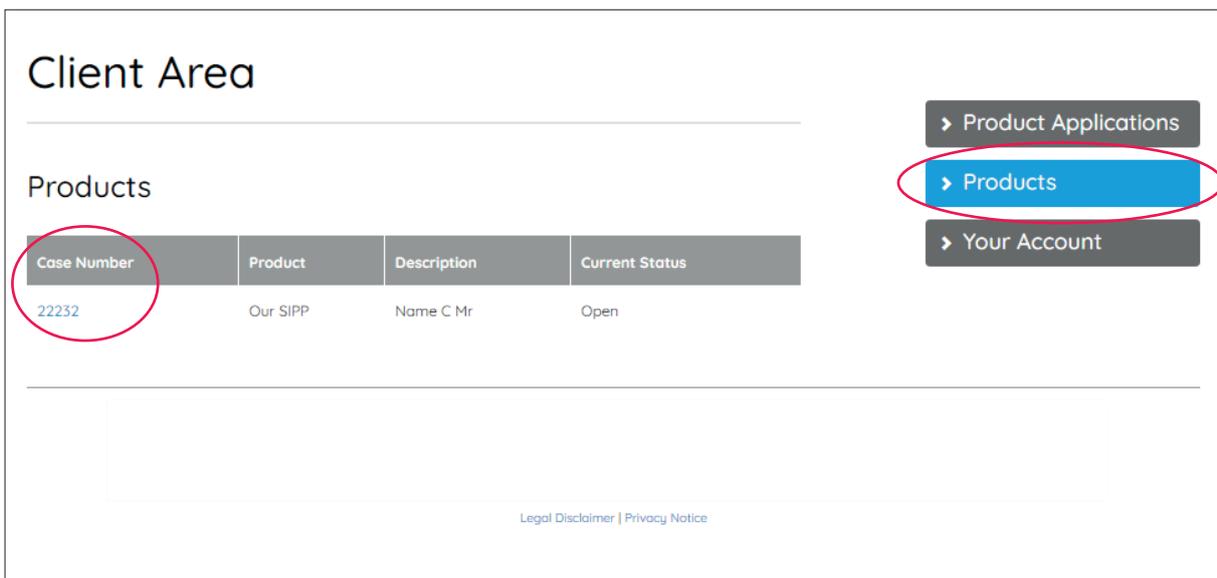
Warning: Do not check this box if you are using a shared or public computer

[Forgotten your password ?](#)

Step 2 – Viewing your SIPP

Once logged in, you will be able to view your SIPP.

Simply click on Products and then on your Case Number (this is your unique SIPP reference number).



Client Area

- > Product Applications
- > **Products**
- > Your Account

Case Number	Product	Description	Current Status
22232	Our SIPP	Name C Mr	Open

[Legal Disclaimer](#) | [Privacy Notice](#)

After clicking on your Case Number, you will be able to see your SIPP details, Personal Details, Adviser Details and Holding Details.

It is important that your personal information is kept up to date. If you need to make any changes to your personal information please let us know by emailing customerrelations@optionspensions.com

Step 3 – Details of your SIPP

By clicking on the Case Number (this is your unique SIPP reference), your SIPP information will load.

To view the details for each section, just click on the blue header (e.g. Case Details) and the section will expand to show further information.

> Client Area > Products > View Product

Case Details

Case Number: [Redacted] Status: Open
Description: [Redacted] Acceptance Date: 26 Jan 2021
Product: [Redacted] SIPP

Client Details

Full Name: [Redacted] National Insurance Number: [Redacted]
Email: [Redacted] Passport Number: Unknown
Phone Number: [Redacted] Passport Country: Unknown
Retirement Age: 65 Passport Expiry Date: Unknown
Correspondence Address: [Redacted]
Permanent Residence: [Redacted]
Tax Residence: UNITED KINGDOM - Regional Tax Regime: Rest of UK ⓘ

Advisor Details

Advisor: [Redacted]
Company: [Redacted]

Holdings

Type	Provider	Description	Reference	Value	As At
Cash (£) ⓘ	Scheme Account	Case Bank Account - Cash Account (Sterling)	[Redacted]	£0.00	Unknown
Cash (£) ⓘ	Scheme Account	Case Bank Account - Unallocated (Client) (Sterling)	[Redacted]	£0.00	Unknown
Units (£) ⓘ	RL 360		[Redacted]	£5,000.00	26/01/2021

Summary of Holdings by Currency

Currency	Total	Total in Sterling
Sterling (£)	£5,000.00	No Exchange Rate(s)
		Summary Total Not Available

Download PDF | Download CSV with Portfolio Share Values

Within your Holdings section, you will be able to see the assets held within your SIPP. You can download this into a PDF document by clicking on the PDF icon. This information can also be exported by selecting the CSV icon.

Step 3 – Details of your SIPP (Continued)

If you want to see a more detailed breakdown for your asset (if there is further information to be displayed), just click on the item in the description. If there is no data under Transaction Details, this means that there is no further information to be displayed.

For example, your SIPP bank account:

The screenshot shows a web interface for a SIPP bank account. At the top, there are navigation tabs: 'Client Area', 'Products', and 'View Product Bank Account'. Below this is a blue header for 'Bank Account Summary - Cash Account'. The summary includes fields for Name, Balance, Balance on date, Currency (Sterling), Status (Active), and Case. Below the summary is a 'Transactions' section with a search icon. The transactions are filtered for January 2021. The table shows two transactions: 'Balance brought forward' on 01 Jan 2021 and 'Transfer in from Test Company' on 26 Jan 2021. At the bottom, there are controls for 'Show Page: 1 (Total Records: 2)' and 'Records Per Page: 10'.

Date	Transaction Description	Credit	Debit	Balance
01 Jan 2021	Balance brought forward			
26 Jan 2021	Transfer in from Test Company			

If you require any further assistance please do call us on 0330 124 1505 or email us at customerrelations@optionspensions.com



Pathlines Pensions UK Limited, trading as Pathlines, is registered in England & Wales, Company No. 02966313 and is authorised and regulated by the Financial Conduct Authority (FRN 463876). Options UK Personal Pensions LLP is registered in England and Wales, Company No. OC345142 and is authorised and regulated by the Financial Conduct Authority (FRN 501747). Our registered office is at 1st Floor Lakeside House, Shirwell Crescent, Fuzton, Milton Keynes, Buckinghamshire, MK4 1GA. The content is for general information only and does not constitute investment, tax, legal, medical or other form of advice. You should not rely on this information to make (or refrain from making) any decisions. Always obtain independent, professional advice for your own particular situation.

FOR MORE INFORMATION PLEASE CONTACT
[OPTIONS UK](#)

1st Floor Lakeside House,
Shirwell Crescent, Fuzton Lake,
Milton Keynes, Buckinghamshire, MK4 1GA.

T: +44 (0) 330 124 1505
optionspensions.co.uk
enquiries@optionspensions.com