



The Xafinity Self Invested Personal Pension (SIPP) and **SimplySIPP**

Activating Your SIPP Centre Account



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Activating your SIPP Centre Account

Your activation e-mail

When we set-up your SIPP Centre Account, an e-mail is automatically generated and sent to the e-mail address you provided us with. This e-mail will:

- be from SIPPTeam@xafinity.com and will be entitled 'Details for your SIPP Centre logon account';
- contain a link for you to follow to activate your accounts; and
- include an Activation Password (which will be a series of characters).

Activating your account

1. Click on the link in the e-mail. This will take you to the 'Account Activation' screen on SIPP Centre.



2. Complete your:

- **E-mail address:** if you are a SIPP Member please use the email address to which we sent the activation e-mail. This is the address you gave on the New Member Application form.
- **Policy Number:** only if you are a SIPP Member. This will be on your New SIPP Member letter which is sent to you when we set up your SIPP. If you need to confirm this now please call The SIPP Team on 01786 434 213 or contact us at sippteam@xafinity.com.
- **Activation Password:** Enter the password provided in your activation e-mail. Only include the fourteen characters provided. If you copy and paste this from the activation e-mail, please check there are no spaces before or after the password (as these will count as extra characters).

3. Enter your memorable security details – you will need these every time you logon to SIPP Centre:

- **New Password:** A minimum of six characters. This can be a mixture of letters, numbers or symbols. Please note your password is **case sensitive**.
- **New Password (Repeat):** Re-enter your new password as entered above. The red text saying '*passwords do not match*' will disappear once you have done this if they do match.
- **Mother's maiden name:** (not case sensitive).
- **Enter a memorable date:** This can be in any format you wish i.e. DD/MM/YY, 1 January, DD/MM or just YYYY. This is not case sensitive. Make a note of the format you choose, as this must be same every time you log-in.
- **Enter a memorable location:** (not case sensitive).

4. Click 'Activate' and a message will display on screen confirming that activation has been successful.

Frequently Asked Questions

My Activation Password isn't working, why?

You need to ensure that this is only fourteen digits long and that the final "." is not included. If this still doesn't solve your problem, try using the 'Reset' option from the menu bar on the SIPP Centre Home page to reset your account and generate a new activation e-mail with a fresh activation password.

SIPP Centre isn't recognising my memorable date but I'm sure this is correct. What's the problem?

The date might be correct, but may be in a different date format to that used when you activated your account. For example if you activated your account with a date in the format 01/01/2010 (ie DD/MM/YYYY), the system will not recognise any other formats (such as 1/1/10, 01/01/10 or 1 January 2010).

I'm a financial adviser and can now log-in to the SIPP Centre but can't access any of my client's details. How do I do this?

There are three levels of access to our Adviser SIPP centre:

- **Firm Principal** - The Firm Principal has access to all SIPP Member information for all SIPPs submitted to Xafinity by your firm. It is the Firm Principal's responsibility to allocate access to specific SIPP Member records to all Individual Users. *Access to specific SIPP Member records will not be possible for Individual Users if the Firm Principal has not granted it.* There can be only one Firm Principal per financial adviser firm.
- **Individual Access** - Access to all SIPP Member information but only for those SIPP members which the Firm Principal allocates to them. There can be as many Individual Access users as is needed.
- **Security Administrator** - Can allocate specific SIPP Member records to Individual Users but cannot access SIPP Member specific details.

I've forgotten my password or security answers, what do I do?

From the SIPP Centre [home page](#) click on Reset. Enter your Account Email Address and hit Reset. This generates a fresh Activation Email. Please now follow the above "Activating your SIPP Centre Account" instructions.

My account has been suspended due to more than three incorrect log-in attempts, what do I do?

Please contact us at SIPPTeam@xafinity.com or on 01786 434 213 and we can re-enable your account for you.

Are the values displayed in my Investment Summary up-to-date?

The values shown in the Bank Account section are up-to-date (as shown in the Date column) because we have a direct feed with Bank of Scotland so these are updated daily. Any other assets held in your SIPP must have the values manually updated on our system so what you can see is the most up-to-date value we have been given and the Date this was confirmed.

This doesn't answer my question – where can I go for help?

If you still can't Activate your SIPP centre account after reading this guide, or have any other questions or problems we can help you with please contact us at sippteam@xafinity.com or call 01786 434 213.