

MyAviva user guide

For Aviva Platform
customers



Retirement
Investments
Insurance
Health



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Aviva Platform - Putting your policies at your fingertips

At Aviva, we like making it easier for our customers to manage their policies with us. That's why we've created MyAviva. Your online account allows you to view all your Aviva policies in one secure and easy to use place, wherever and whenever you want.

MyAviva offers you a host of benefits:

- Check your policy details and documents
- View valuation and investment information
- Safe, secure and easy to use

Working with your financial adviser

Your relationship with your adviser will remain unchanged if you register for MyAviva. MyAviva is designed to make it easier for you to keep track of your investments (and any other policies you have), complementing the support you already have from your financial adviser.

Please note: your MyAviva experience may differ slightly from that shown in this guide, depending on which products you hold.

How to register

(page 1 of 3)

If you don't already have a MyAviva account, click 'register' to set yours up. You don't need to enter an activation code.

Register for MyAviva

Already have an account? [Log in](#)

Received an activation code?

You may have received an activation code from us. It will help us identify you and speed up your registration.

Please enter your activation code

It starts with three letters, for example MYA, SHR or FST.

Continue

No activation code?

Don't worry, you can easily register.

Register

Need some help?

AVIVA

Set up your account

We just need a few details to setup your account.

[Need some help?](#)

Email

Confirm email
AClient@aviva.com will also be your username. Use it to log in.

Choose a password

First name

Last name

[Continue](#)

1

How to register (page 2 of 3)

Fig 1: You'll now need to provide some basic details to set up your account.

The email address and password you enter will be used as your login credentials so please ensure you use your own personal email account.

AVIVA Insurance Investments Retirement Health [Log out](#)

2 [Continue your registration](#)

Motor Home Travel Life Health Other

We're currently working on adding all quotes to MyAviva. If you've saved a quote, you can retrieve it below.

[Retrieve quote >](#)

Fig 2: Next you'll be prompted to 'Continue your registration'.

AVIVA

Let's find your products

Your account has been set up. We just need a few personal details to find the policies and plans you hold with us.

Date of birth Day Month Year
 Please Select

Postcode

The postcode we hold for your policy [I don't live in the UK or there is a problem with my postcode](#)

Continue

Need some help? [+](#)

1

How to register (page 3 of 3)

Fig 1: Enter your date of birth and postcode to help us find your platform account (and any other Aviva policies you have).

AVIVA

Thanks!

We just need a few more details before we can show you the policies and plans you hold with us.

Policy/plan number or Activation code [Where can I find my policy/plan number?](#)

The activation code would have been sent by email or in the post, it begins with 'MY' or 'FST'

Continue

Need some help? [+](#)

2

Fig 2: Next, enter your AV account number. You'll then be asked to enter your national insurance number and policy type.

Your AV account number starts with the letters 'AV' followed by a series of numbers. You can find your policy type on your policy documents.

Don't know your AV account number or policy type? Your financial adviser will be able to tell you.

How to log in

If you've already registered for MyAviva, simply log in to see your platform account, alongside any other Aviva policies you have (eg home or car insurance).

How to view your platform account details:

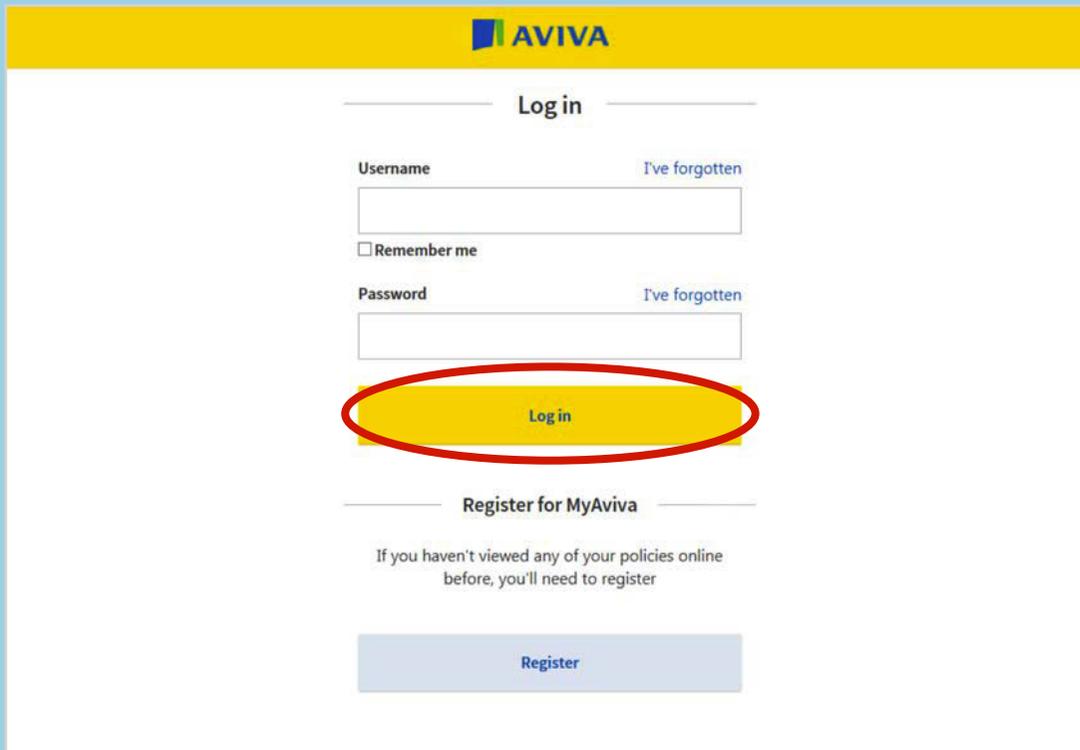
If you can't see your platform account(s) when you log in, you'll be given the option to 'unlock your policies'.

To do this, you'll need to provide some basic information including: your AV account number, national insurance number and policy type.

Your AV account number starts with the letters 'AV' followed by a series of numbers. This is your new account number which you may have been sent.

Don't know your AV account number or policy type? Your financial adviser will be able to tell you.

If you don't already have an account, you'll need to register – see page 4.



AVIVA

Log in

Username [I've forgotten](#)

Remember me

Password [I've forgotten](#)

Log in

Register for MyAviva

If you haven't viewed any of your policies online before, you'll need to register

Register

1 Total portfolio value* £32,379.76
Value shown above includes values of products bought through an adviser only.

2 Investments bought through an adviser

ISA Portfolio

Policy number	AV2421073-002
Fund value*	£10,003.18

3 Details >

Investment Portfolio

Policy number	AV2421073-003
Fund value*	£10,001.30

Details >

Pension Portfolio Pre Retirement

Policy number	AV2421073-001
Fund value*	£12,375.29

Details >

*Values shown are the latest available. They are not guaranteed and can go up and down, so you may get back less than the amount invested.

Can't see a policy?

Policy overview page

Once you've logged in or registered, you'll come to the Your policies page on MyAviva.

This page shows summary information for your platform accounts.

On this page you can see:

- The total value of all your investments with Aviva **(fig 1)**.
- Summary information for each individual platform account **(fig 2)**.

To see more in-depth information, click the 'details' button next to the account you'd like to know more about **(fig 3)**.

Platform account details (Summary tab)

The screenshot shows the AVIVA platform account details page. The top navigation bar includes the AVIVA logo (1), a user profile dropdown (2), and links for Contact Us and Logout (5, 6). The main content area is divided into several sections: a summary card (3) showing the current value of £10,000.00 and a change of £0.00 since 27/02/2018; a valuation and asset allocation section (4) featuring a pie chart and a table showing 90.00% Cash and 10.00% Bonds; a largest holdings section (5); a latest transactions section (6); an investment portfolio details section (7) listing account number AV2421073-003, inception date 27/02/2018, and account name Investment Portfolio; a payments section; and a help and support section.

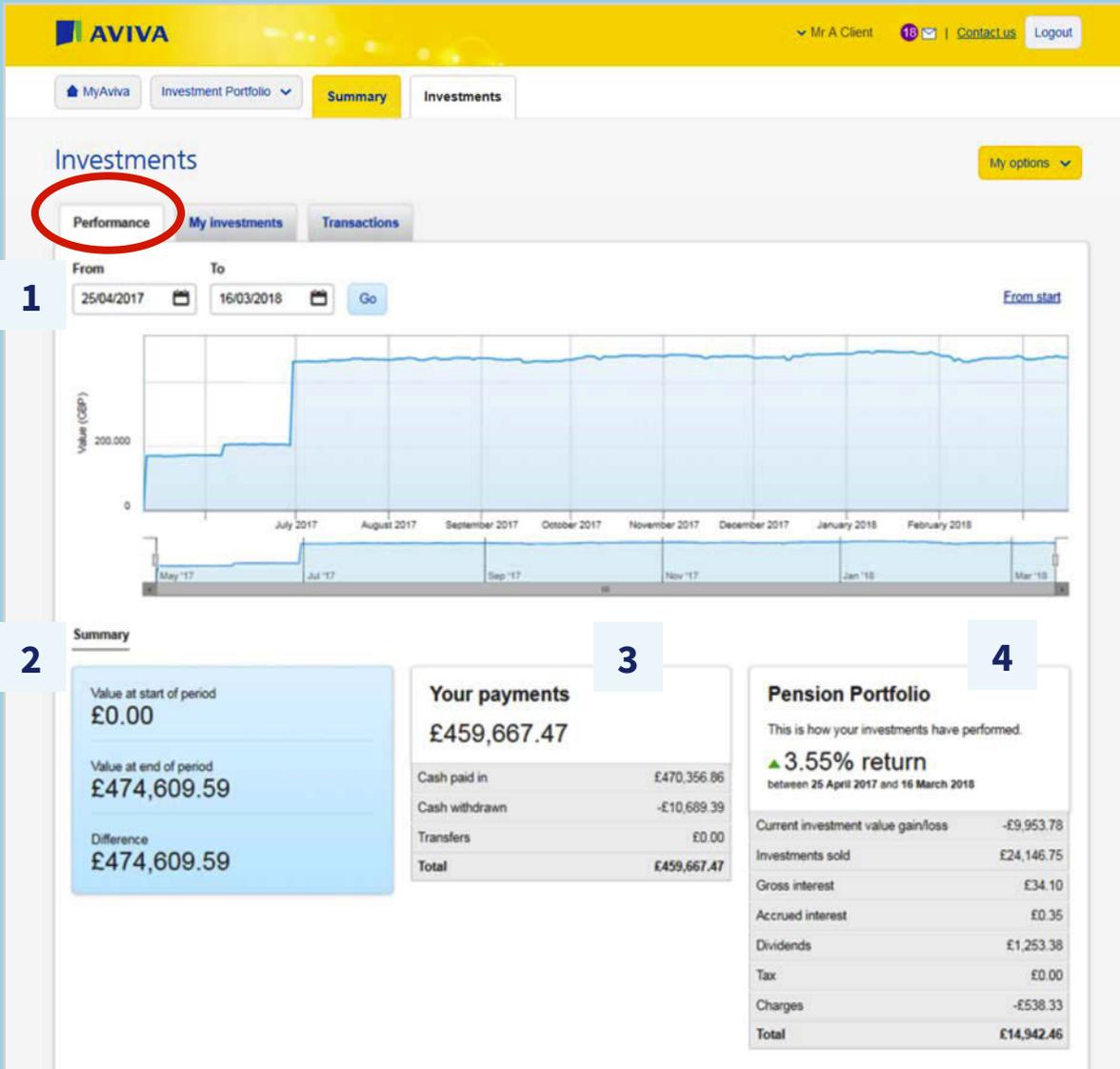
Once you've clicked on the 'details' button on the MyAviva landing page, you'll come to this page. It gives you a more in-depth summary of whichever platform account you've selected.

On this page you can:

- **Fig 1:** Choose which platform account you want to view from this drop-down menu.
- **Fig 2:** Return to the MyAviva policy overview page using the home button.

The information you'll see may vary, but may include:

- **Fig 3:** Account valuation (current and historic values).
- **Fig 4:** Asset allocation (if any individual assets are held in a model portfolio, these will be grouped for display purposes).
- **Fig 5:** Largest holdings by value.
- **Fig 6:** Latest transactions, such as payments in and out.
- **Fig 7:** Basic platform account details. For ISA Portfolio you will also be able to see your current available tax year allowance.



Platform account details (Investments tab)

‘Performance’

Here you can find more detailed information about the performance of your platform account, including:

Fig 1: Customisable date ranges for historic performance.

Fig 2: Opening and closing values.

Fig 3: Payments in and out of your account, such as transfers and withdrawals.

Fig 4: Additional performance information.

AVIVA Mr A Client 18 | CONTACTUS Logout

MyAviva Investment Portfolio Summary Investments

Investments My options

Performance **My investments** Transactions

This page shows details of the investments held in your Investment Portfolio. You can click the investment details dropdown for more information on each asset.

As at 27/02/2018 Select

Name	Total cost	Value	Change in value	% of Investment Portfolio
GBP Cash	£9,000.00	£9,000.00	-	90%
Aviva Inv Strategic Bond 2 Inc	£1,000.00	£1,000.00	£0.00	10%
Total	£10,000.00	£10,000.00	£0.00	100.00%

1

2

Platform account details

(Investments tab - continued)

'My investments'

Here you can see more detailed information about the assets you're invested in, including:

- **Fig1:** Assets currently held, and historic assets held
- **Fig 2:** Cost, value, and percentage holdings for each asset

For details about a particular investment (including fund factsheets), use the drop down menu **(fig 3)**.

AVIVA Mr A Client 18 | CONTACTUS Logout

MyAviva Investment Portfolio Summary Investments

Investments My options

Performance My investments Transactions

Aviva Inv Strategic Bond 2 Inc Code: DBI7.GB

View price 3 years Go

Price 1.1 1.075 1.05 1.025 May 15 Sep 15 Jan 16 May 16 Sep 16 Jan 17 May 17 Sep 17 Jan 18

In your portfolio As at 27 February 2018

Units held 920.4710 Held in Investment Portfolio

Total cost	£1,000.00	Fund Factsheet
Average cost per unit	£1.09	Key Investor Information Document / Key Information Document or Simplified Prospectus
Current price *	£1.09	
Current value *	£1,000.00	
Change	£0.00	

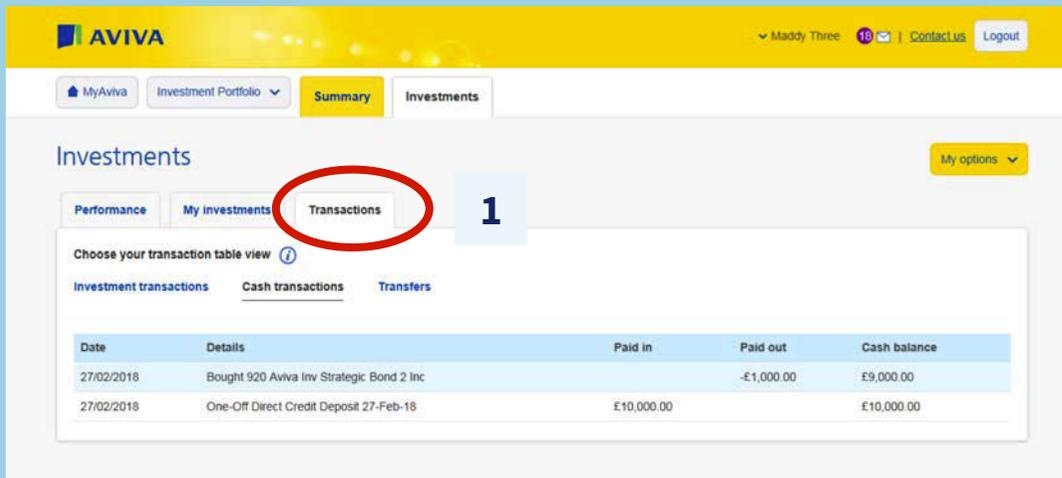
* The values shown in these fields are an average cost of purchases and do not reflect any prior transactions. Values are shown to two decimal places and may have been rounded.

Terms of use Accessibility Privacy policy Cookie policy Site map

3

Platform account details

(Investments tab - continued)



The screenshot displays the AVIVA platform account details page. The top navigation bar includes the AVIVA logo, user name 'Maddy Three', and options for 'Contact Us' and 'Logout'. Below the navigation bar, there are tabs for 'MyAviva', 'Investment Portfolio', 'Summary', and 'Investments'. The 'Investments' tab is active, and within it, the 'Transactions' sub-tab is highlighted with a red circle and a blue box containing the number '1'. Below the tabs, there is a section titled 'Choose your transaction table view' with three options: 'Investment transactions', 'Cash transactions', and 'Transfers'. The 'Cash transactions' option is selected. A table of transactions is displayed below, with columns for Date, Details, Paid in, Paid out, and Cash balance.

Date	Details	Paid in	Paid out	Cash balance
27/02/2018	Bought 920 Aviva Inv Strategic Bond 2 Inc		-£1,000.00	£9,000.00
27/02/2018	One-Off Direct Credit Deposit 27-Feb-18	£10,000.00		£10,000.00

‘Transactions’

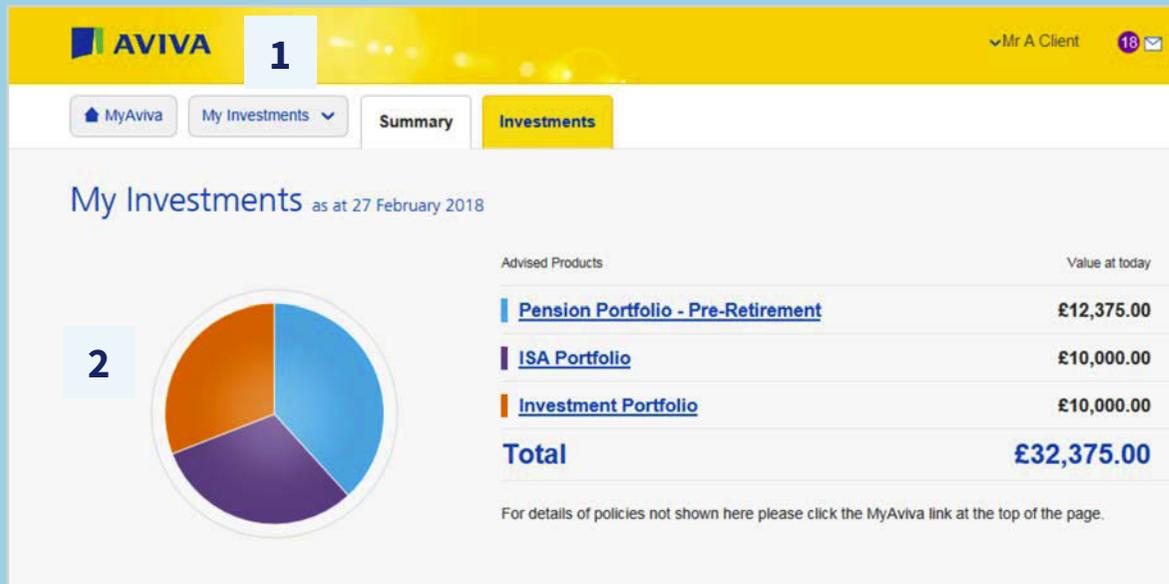
Here you can see details of any transactions that have been made by your platform account **(fig 1)**.

My investments

(Summary tab)

You can see an overview of all your platform accounts by selecting 'my investments' from the drop-down menu **(fig 1)**.

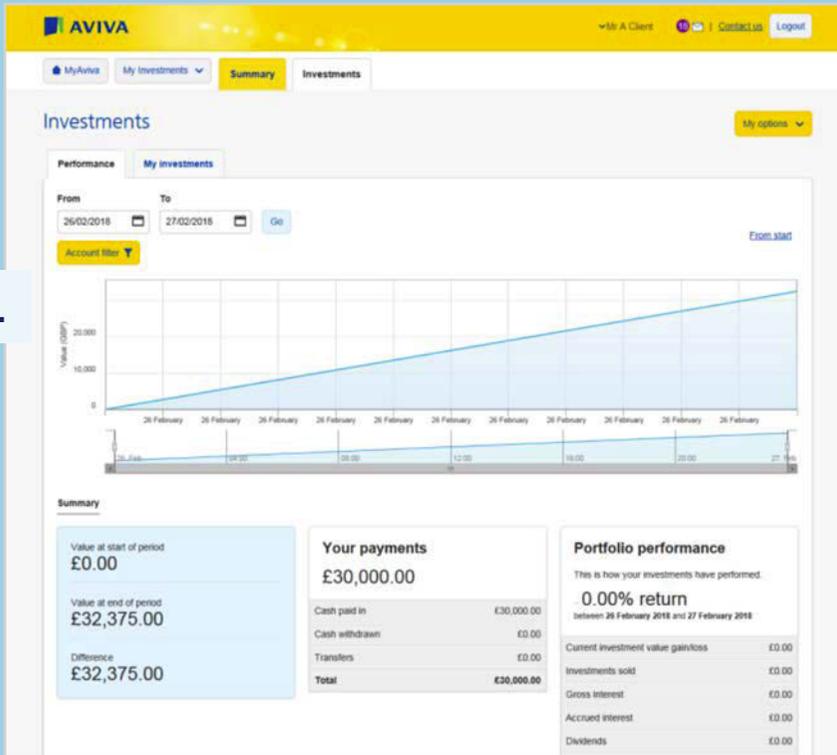
The value of each of your platform accounts is shown individually and as a percentage of your overall platform portfolio **(fig 2)**.



My investments (Investments tab)

On this screen you can see detailed performance information (**fig 1**) and detailed investment information (**fig 2**) for all of your platform investments.

1

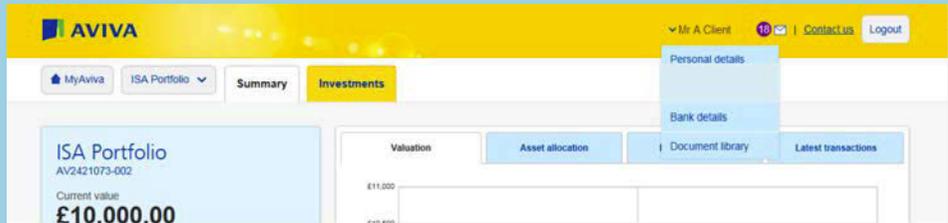


2

The screenshot shows the 'Investments' tab for 'My investments'. It displays a table of investments held in the My Investments account as of 27/02/2018. The table includes columns for Name, Total cost, Value, Change in value, and % of portfolio.

Name	Total cost	Value	Change in value	% of portfolio
GBP Cash	£29,385.00	£29,385.00	-	91%
Aviva Inv High Yield Bond 2 Inc	£1,000.00	£1,000.00	£0.00 ▼	3%
Aviva Inv Strategic Bond 2 Inc	£1,000.00	£1,000.00	£0.00 ▼	3%
Aviva Inv Cash 2 Acc	£990.00	£990.00	£0.00 ▲	3%
Total	£32,375.00	£32,375.00	£0.00 ▼	100.00%

View your personal details



Using the drop-down menu in the top right of any screen, you can view:

- The personal details we hold for you, such as your address and contact details.
- The bank details we hold for you, which we use for any payments or withdrawals to/from your platform account.
- Electronic copies of any correspondence we've sent you (including key notices and policy documents) in the document library

Glossary

Here are some of the terms you might come across while looking at your Aviva Platform account(s) in MyAviva.

Asset: what you are invested in, for example cash, individual funds or commercial property

Allocation: where your money is being invested, for example an asset or as cash.

AV account number: your Aviva Platform policy number. This starts with AV followed by a series of numbers.

Holding: the name of an asset

Model portfolio: a grouping of assets that has been set up for you by your financial adviser

Payments in: payments made into your Aviva Platform accounts, for example regular or one-off contributions

Payments out: payments out of your Aviva Platform accounts, for example income paid or withdrawals

Platform account: your Aviva Platform policy

Platform portfolio: if you have multiple Aviva Platform accounts, for example an Investment Portfolio and an ISA Portfolio, these will be grouped into your Platform portfolio

Policy type: the type of policy you hold, for example Investment Portfolio

Transfer: any cash or asset transferred into or out of your Aviva Platform policies

Valuation: the value of your holdings on the valuation date



If you have any trouble registering for MyAviva please contact 0808 101 0860 or email myaccount@aviva.com

For any help understanding your investments and investment options, please contact your financial adviser.

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aviva.co.uk

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