Options UK Online Portal

SIPP Client Guide

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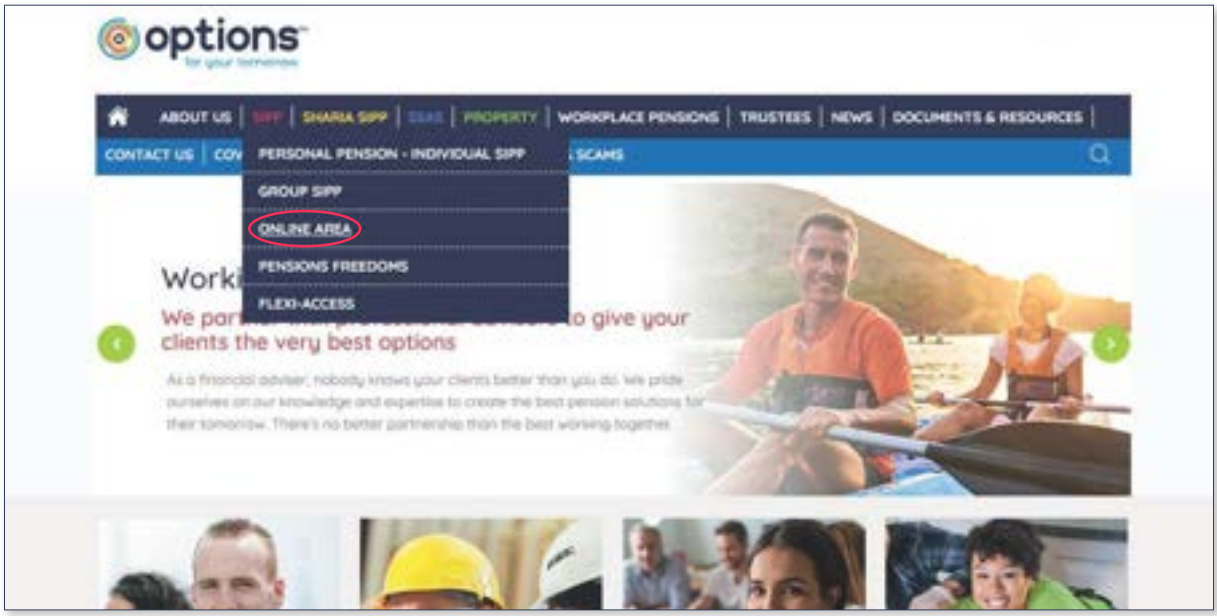
for your tomorrow

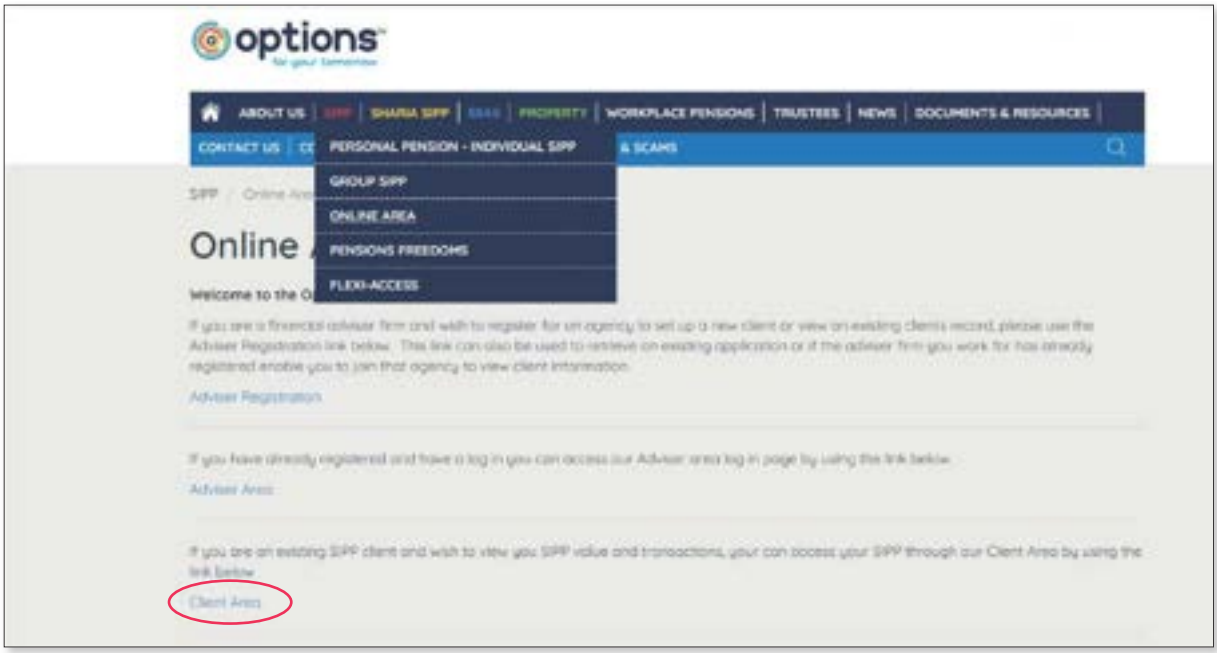
Accessing your SIPP Information online is easy. Just follow these steps.

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.stmgroup.online/client-area/
It will take you direct to our Client Area.



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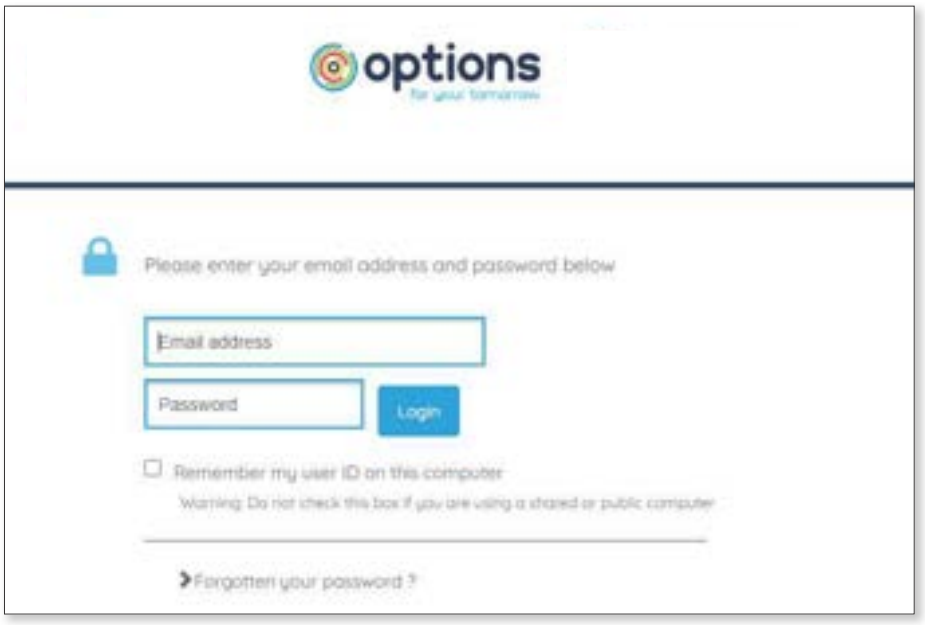
Step 1 – Online Access (Continued)

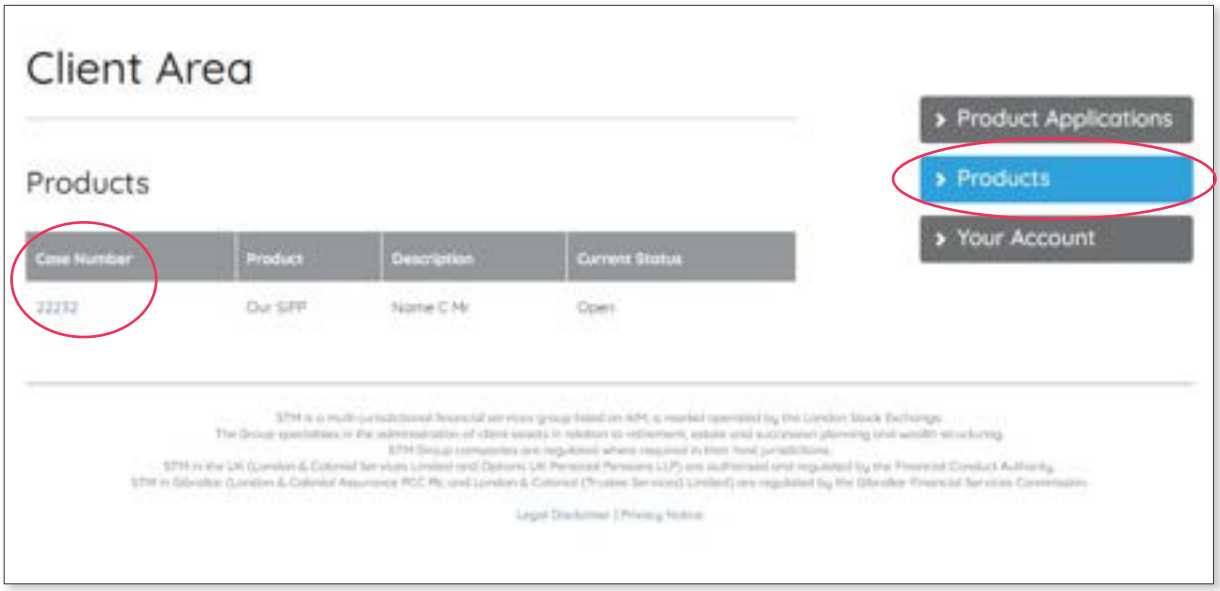
In the Client Area, you will be asked to log in with your email address and password.



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).



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.co.uk

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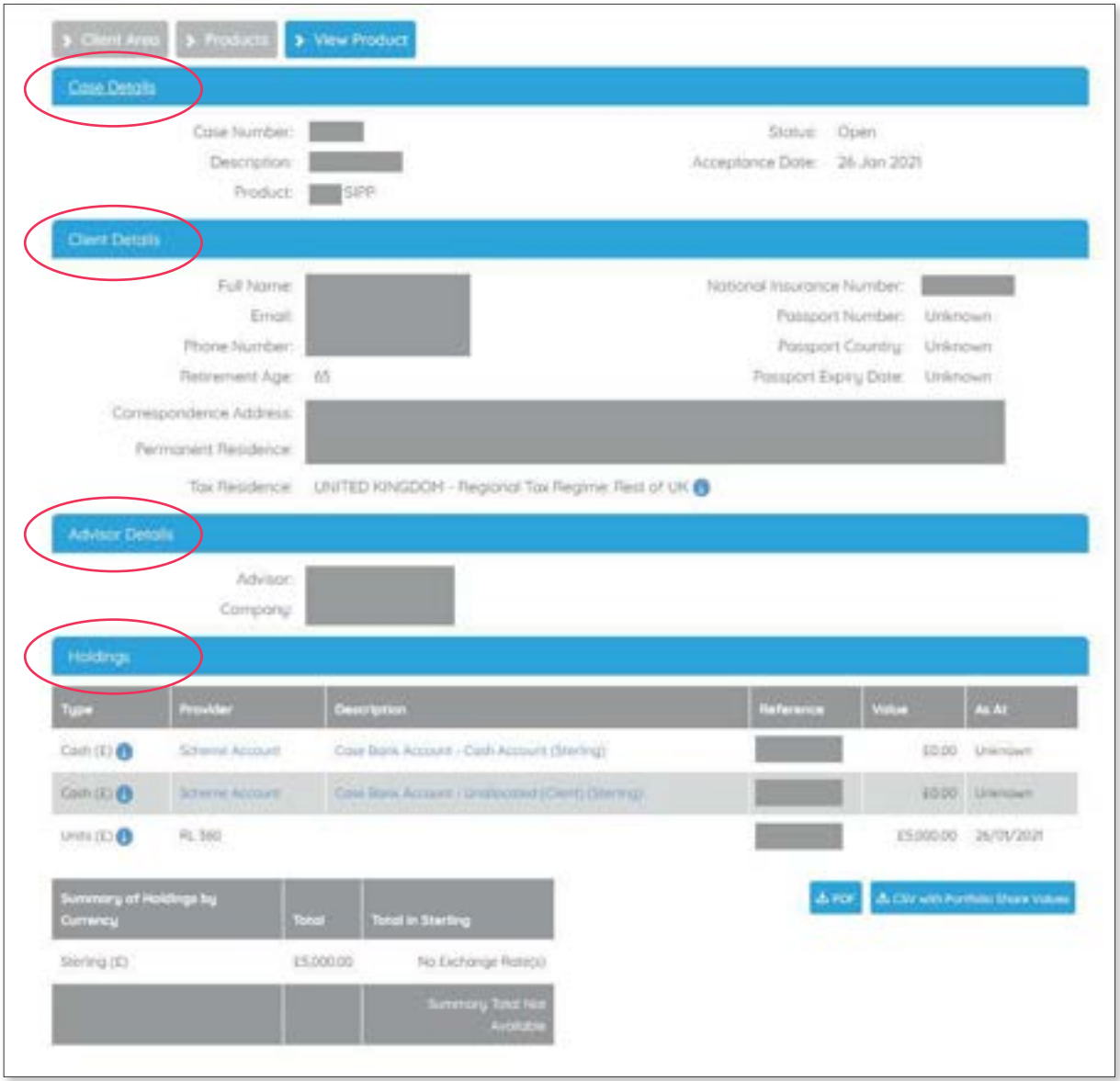
Step 3 – Details of your SIPP

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.



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.

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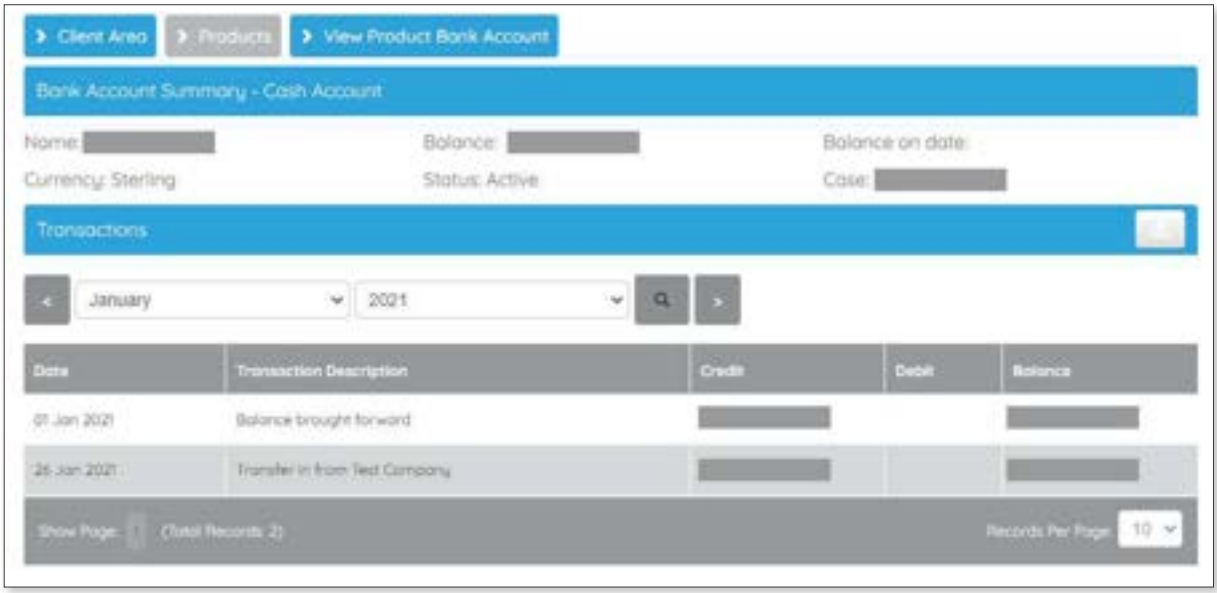
Step 3 – Details of your SIPP (Continued)

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:



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

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