



# Nutshell

YOUR PERSONAL FINANCE PORTAL

## A guide to using Nutshell, the Rouse Personal Finance Portal

Keeping an eye on the money you've squirrelled away is easier than ever with Nutshell. It gives you secure access to all your finances in one place, day or night, on any mobile or web device. A few basic steps are all it takes to get you going.

[SIGN UP NOW](#)

Call: 01983 535740 or visit: [www.rouseitd.co.uk](http://www.rouseitd.co.uk)

**ROUSE**  
INTELLIGENT FINANCIAL PLANNING



## Step 1

Go to **www.rouseltd.co.uk** and click on the Nutshell link. You will be taken to the Rouse Nutshell, Personal Finance Portal home page (below). Here you can login to your account or, if you are a new user, you can register. Simply click the relevant button in the top right hand corner of the page.

**Personal Finance Portal**  
New to PFP?  
[Watch the Introduction](#)

**Personal Finance Portal (PFP)** is a service available only from your **financial adviser** or **mortgage broker**. PFP can give you access to view **all** your finances in one place, 24/7, on any mobile or web device. PFP enables you to view your **fund information** and **financial portfolio** in an instant. So whether you're looking for an up-to-date valuation of your **portfolio**, want to assess how you're progressing against your goals or simply wish to get in touch, PFP has it covered.

## Step 2

**Registration:** enter the email address we currently hold for you. It's important to use this particular email as it's linked to other security information about you that will help verify your identity. Click the **"Start Registration"** button and we'll send an activation link to your email address.

**Registration**

**Step 1**  
Enter your email address that you have given to your adviser in the box below.

**Step 2**  
Click the "Start Registration" button and we'll send an activation link to your email address.

**Step 3**  
Click the link in the email and follow the on-screen instructions.

**Step 4**  
Congratulations! You are ready to log in to your Personal Finance Portal.

Email

[Start Registration](#)

## Step 3

You will receive an activation email. Please click the **"Activate Account"**. This will take you to some simple online instructions. These include verifying your identity and creating a password.

## Step 4

Once you're through the registration process and can login securely to your account – it's over to you!

**Login**

Email or Username

Password

[Login](#)

[Forgotten your Password?](#)  
[Forgotten your Username?](#)



## The Nutshell Dashboard

Your Nutshell Dashboard puts you in control the moment you log in.

Your adviser details are always at the top of the screen. You can tap their number to call them from a phone device, or contact them via secure messaging by tapping 'Contact'. You can also logout or bring up the menu at any time using the buttons beside your own picture. If you haven't uploaded your picture yet you can do this from inside the 'Profile' section.

The different widgets give you an overview of your finances and communication with your adviser. Just click on the relevant widget icon to view the detail. If viewing on a desktop or laptop, you can drag and drop the widgets into the order that best suits your needs.

**The dashboard widgets give you summaries on the following areas of PFP:**

### Messages

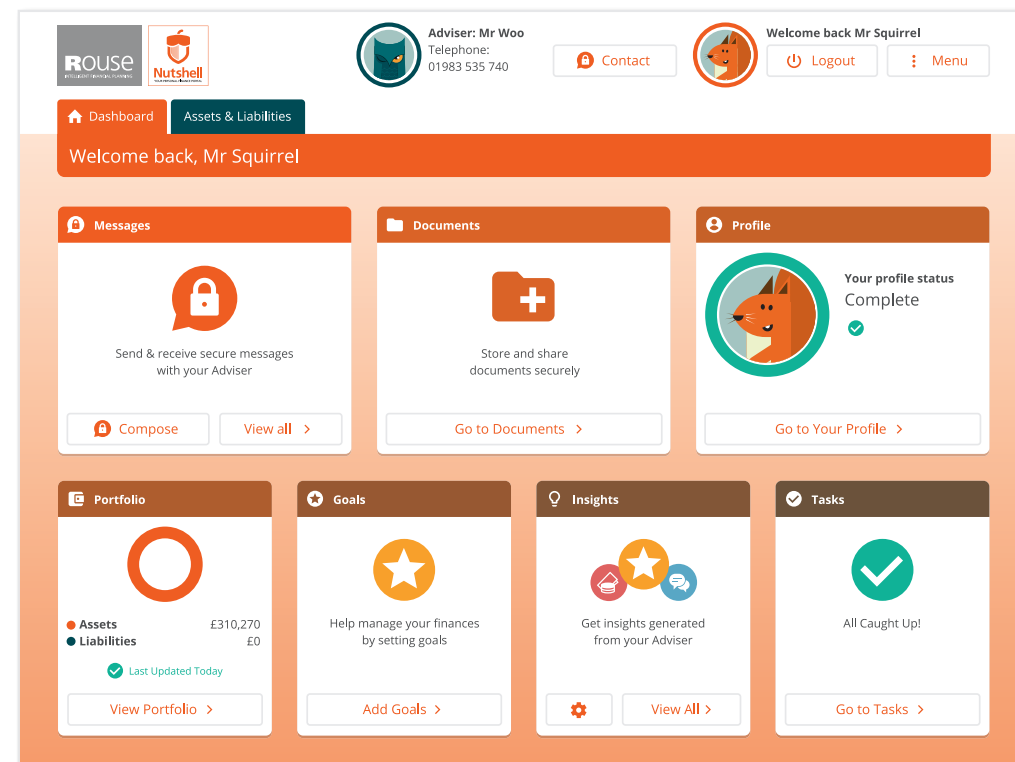
You can see, and open, your new secure messages and your most recent read messages, straight from the dashboard. You can also tap to compose a new message to your adviser, or to view the secure message page.

### Documents

You can see and open any new documents that your adviser has shared with you, along with your other most recent documents. You can also tap 'Go to documents' to view the full Documents page.

### Profile

This widget shows you how much of your profile information has been completed and how up-to-date the information is. You can tap to review and update the information. Your profile is also highlighted using traffic light colours - if it's green then that means you have reviewed your data recently; if it's amber then you should think about reviewing your data; if it's red then you should review your data now. It's very important that your personal data is current and correct.



### Portfolio

You can see an overview of your net worth which illustrates the size of your assets and liabilities. You can tap to view a full breakdown by category.

### Goals

This widget shows your progress towards your savings goals. You can tap to view the full Goals page.

### Insights

You can see the latest Insights relating to your finances. You can tap to view your Insights in full or to amend your Insights settings.

### Tasks

This widget shows an overview of your adviser's tasks relating to your account. Tasks are highlighted in green where completed, or in red where overdue. You can tap to view the full Tasks page.



## Assets & Liabilities tab

The Assets & Liabilities tab shows your portfolio's valuation in a series of graphs. These graphs have a default range of three months but you can select a range yourself.

Equally, under Account Categories, if you are unhappy with any of the categories Nutshell has allocated to your transactions, you can change those too.

### What is defined as an Asset & Liability?

#### Asset

An asset is a portfolio item which falls into one of the following categories:

- ▶ Current Accounts
- ▶ Savings Accounts
- ▶ Investments
- ▶ Pensions
- ▶ Property (property in this sense includes property and land, but also physical, tangible items like art & collectibles, cars, boats etc.)
- ▶ Protection is not included in any of the calculations, but visually is grouped with Assets. No value figure will appear next to the Protection navigation banner.

#### Liability

A liability is a portfolio item which falls into one of the following categories:

- ▶ Credit Cards
- ▶ Mortgages
- ▶ Loans

