

# progeny

established for tomorrow's wealth



powered by  moneyinfo

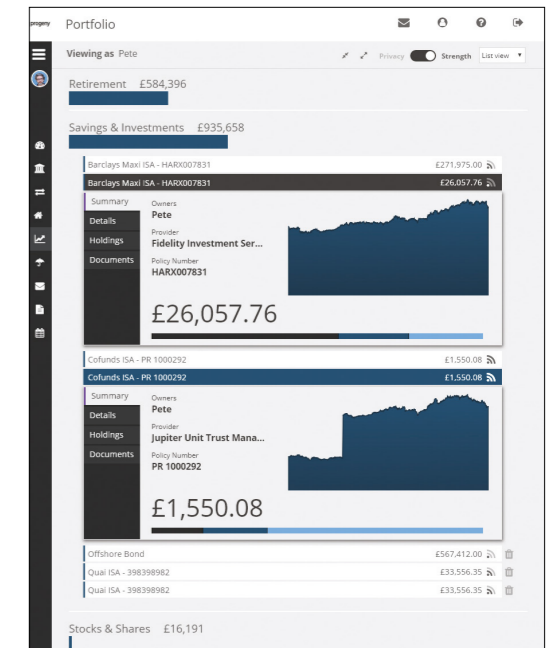
A clear, uncomplicated view of your finances in one place. Your investments, savings, pensions, insurances, bank accounts, credit cards, store cards, mortgages, loans and property alongside all the associated paperwork.

On your desktop and as an app on your tablet and smart phone, your finances are beautifully brought together under a single login accessible to you at any time, wherever you are.



## Keep track of your investments

**Progeny Portal** makes it easy to see how your investments are doing. Valuations are updated daily and build into a history across your entire portfolio.



## With Progeny Portal you can...



View your investment portfolio



Quickly access your insurance details



Track your property values



Manage your income and spending



Safely store all your important documents



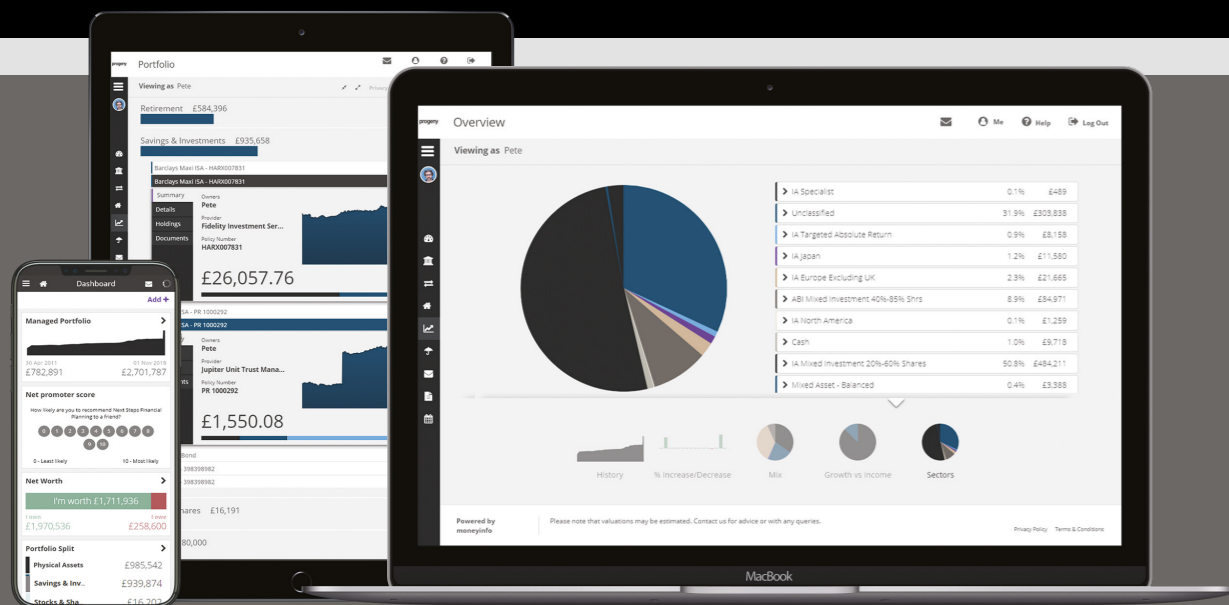
Be reminded about your renewals, income and payments

## Everything summarised

Your dashboard gives you a snapshot of your entire financial life and an easy navigation point to everything you need. Personalise it to display the information that matters to you most.

## Your personal financial assistant

Keep an eye on upcoming renewals, payments, income and maturities. Add your own key events such as MOTs, road tax and HMRC payments.





## Keep your important documents safe

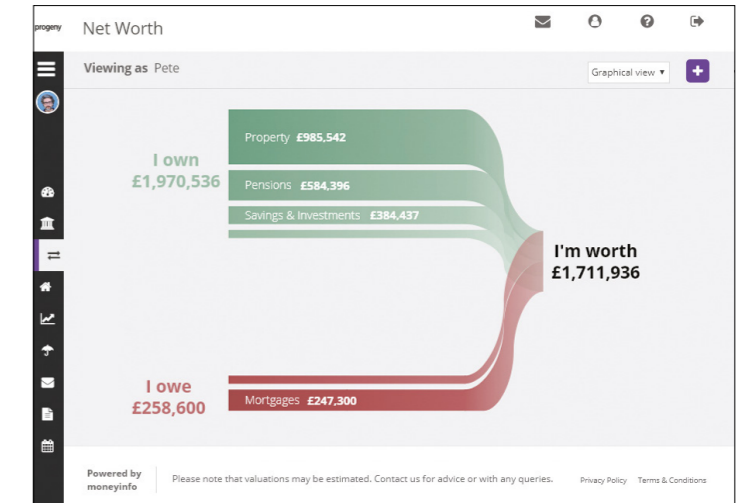


Store all your paperwork including wills, property deeds, insurance contracts, policy documents, valuations and statements. **Progeny Portal** keeps your important financial documents safe, secure and accessible.

Your adviser can share documents and reports with you so you can read them when it's convenient. Simply log in to **Progeny Portal** from any device and your important financial documents will be there waiting for you.

## A true picture of your net worth

**Progeny Portal** tracks the value of your assets and liabilities over time. For you, your partner, your dependants, your trusts, your companies: all brought together into a single view.



## See where your money goes

Access your bank accounts, credit cards and store cards together under one secure login. **Progeny Portal** helps you keep track of your income and spending and see where your money is really going.



## Your property valued

Want to know what your home is worth? Enter your house number and postcode and **Progeny Portal** will display your property details and track its value using Land Registry data.

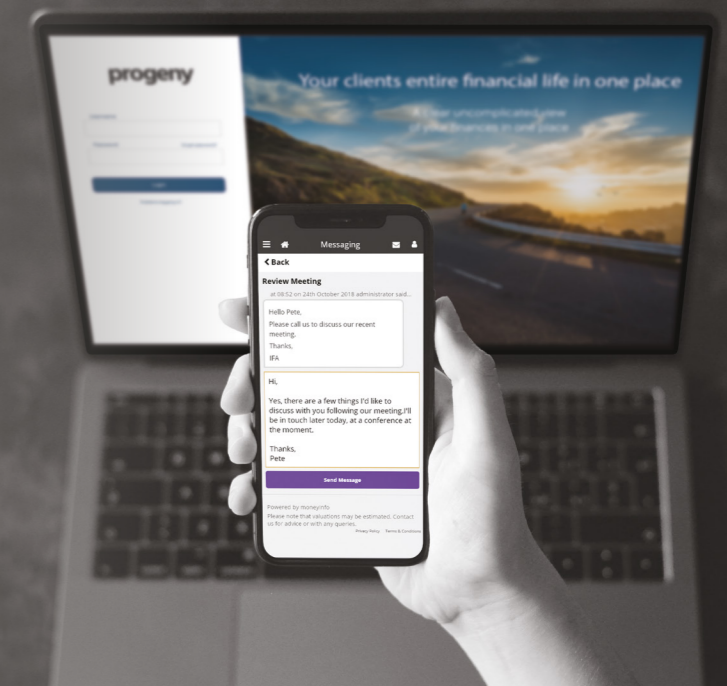
## Access your insurances when you need them

Your policy details are stored next to the things they relate to. Your home insurance next to your home, your car insurance next to your car. **Progeny Portal** reassures you that in the event of an emergency you can access the information you need quickly and easily.



## Secure and timely communications

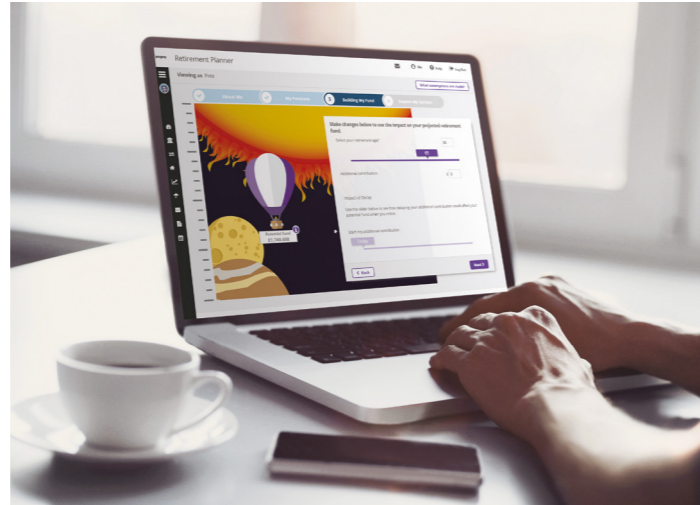
**Progeny Portal** ensures that your personal data is exchanged using only the most secure methods. Notifications alert you when important messages or documents are waiting to be read.





## Explore your retirement options

Take an exciting balloon ride to discover how much your pension savings might be worth in the future. See the impact of how small changes to your current lifestyle can provide you with a much better financial future.



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## Putting you in control of your finances

Your personal digital filing cabinet with all your finances organised and updated. It's financial peace of mind in your pocket, knowing that your most valuable records are safe and accessible.

No need to log on to multiple financial sites, helping to reduce the risk of online fraud.

Keep all of your financial records together and easily track your income and expenditure.

Access your information when you need it from any device.

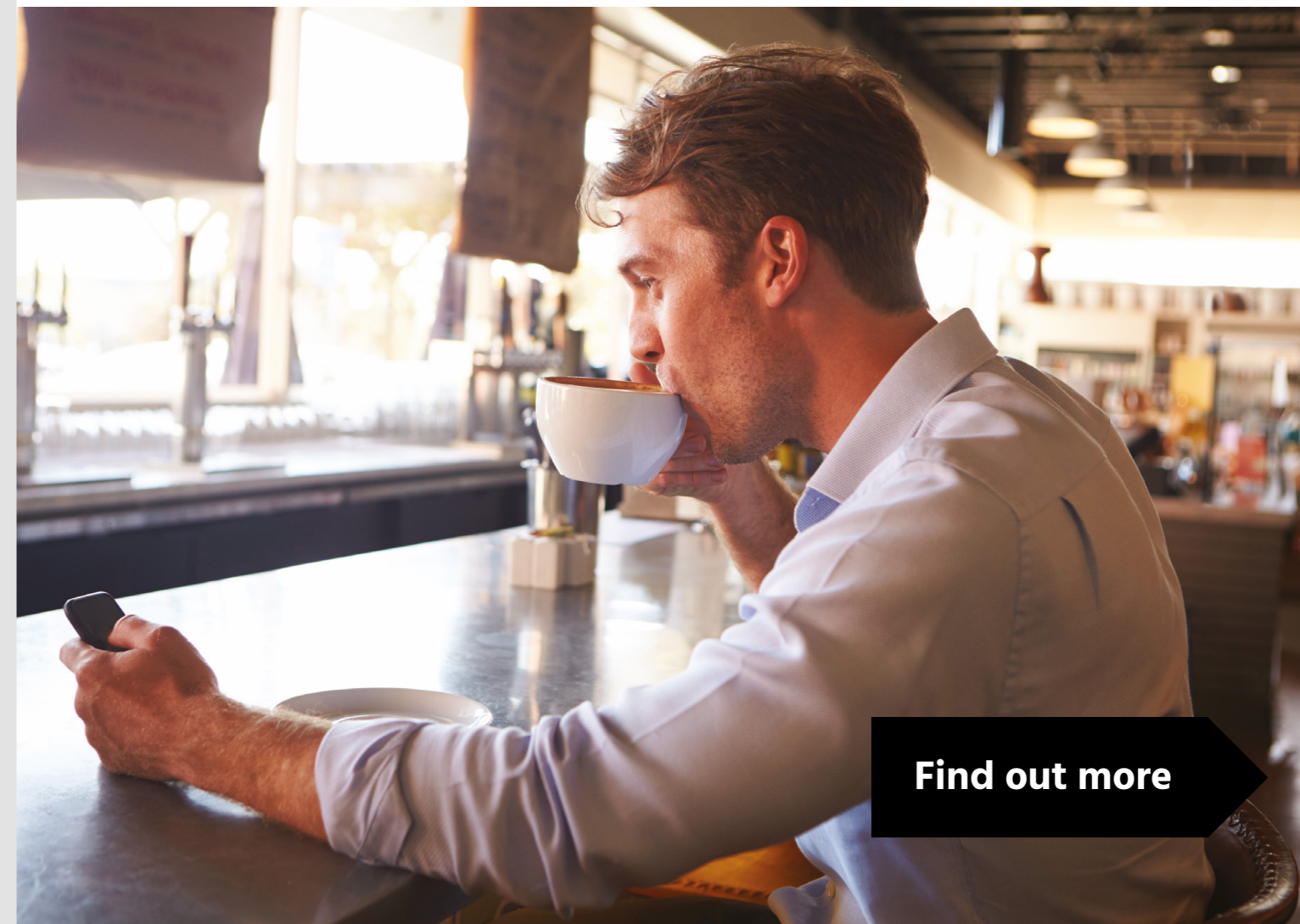
## Your data is always protected

We take the security of your personal and financial information very seriously and **Progeny Portal** makes sure that your data is safeguarded using bank level security and encryption. Our mobile app is further protected with your own six-digit pin and registered to your personal device.

## And finally, for your peace of mind

If an emergency situation arises, where will the important details about your assets, liabilities, property and insurances be found?

**Progeny Portal** brings all this information together in one place with all the associated paperwork, making it accessible should it be needed.



**Find out more**

# Testimonials

“For the first time I can see what I’m worth. I can see my home going up in value, as well as what my savings are doing. I feel in control, and I feel more confident making important financial decisions.”

“Now I only have to remember one login to access all of my important financial accounts and documents.”

“Progeny Portal provides me with a helicopter view of all my finances and the detail when I need it. I love it.”

“It’s great being able to see all of my recent transactions in one place rather than logging into several different websites.”

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0344 225 0660

[www.theprogenygroup.com](http://www.theprogenygroup.com)

[enquiries@theprogenygroup.com](mailto:enquiries@theprogenygroup.com)