The smart investment platform

How to log into your platform account

User Guide

Welcome

This guide explains how to access your Novia Global online platform account, what login details you need, and how to resolve common login issues.

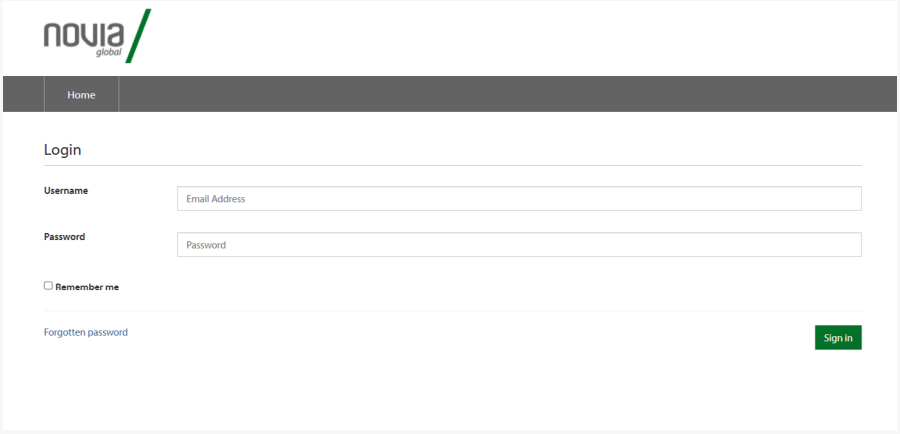
1. How to Log In

To log into the Novia Global platform, you'll need your:

- **Username (which is your email address)**
- **Password**

If you don't already have these details or haven't activated them, please see the First Time Login section below.

Steps to log in



Step 1

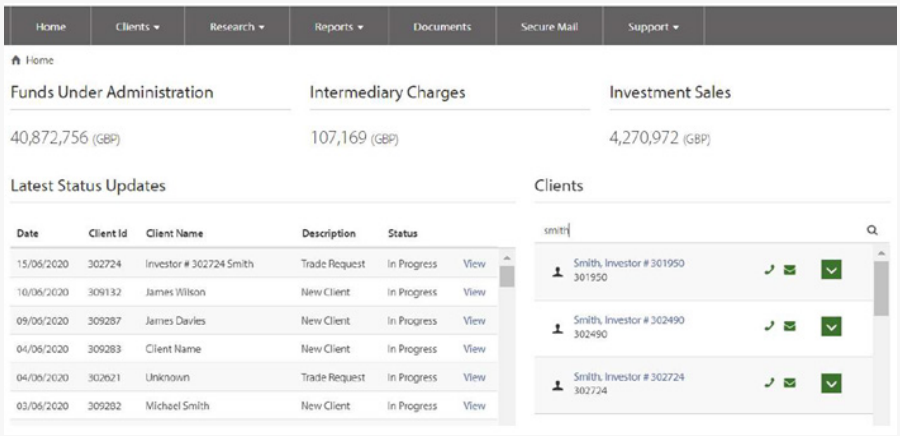
Go to the Novia Global login page.

Step 2

Enter your **username**. This is your email address.

Step 3

Enter your **password**.



Step 4

Click **Sign in** to access your account dashboard, where you can view your investments, documents and portfolio information.

If you experience any issues logging in, please check the FAQs sections below. Further information is also available in our Knowledge Hub.

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2. First Time Login / Account Activation

If you haven't logged in before, your adviser must first enable online access for you. Once this is done, you will receive an email containing a link to activate your online account. This link will take you to the activation screen.

You have 15 days to activate your login, if the link expires, you will need to contact client services who will issue you with a new link.

To activate your account:

1. Open the email from Novia Global with your activation link.
2. Click the activation link.
3. On the activation page, enter your **Date of Birth** when prompted (this is used for identity verification).
4. Create a **new password**. Your password must meet our security criteria (length and complexity).
5. Select a security question and answer, which will be used if you need future help accessing your account.
6. Return to the login page and enter your username and newly created password.

If you did not receive an activation email, please check your Spam/Junk folder.

If you still can't find it, contact your adviser or Novia Global's Client Services team.

3. Forgotten Password – How to Reset

If you have forgotten your password, you can reset it from the login page.

To reset your password:

1. Go to the Novia Global login page.
2. Click Forgotten Password.
3. Enter your email address registered to your account.
4. We'll send you an email with a password reset link (valid for 24 hours).
5. Open the email and click the reset link.
6. Enter your Date of Birth for identity verification.
7. Create a new password and set a new security question and answer.
8. Return to the login page and sign in with your updated credentials.

If you don't receive the reset email, check your Spam/Junk folder.

If it still isn't received, contact your adviser or Novia Global's Client Services team for assistance.

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4. Frequently Asked Questions

I haven't activated my online account — what should I do?

If you haven't received an activation email or can't find the original:

- Check your Spam/Junk folder.
- Contact your financial adviser to confirm online access has been enabled.
- If necessary, adviser or Novia Global Client Services can resend the activation email.

What if my reset link doesn't work?

Password reset and activation links are time-limited for security reasons. If a link expires:

- Repeat the forgot password or account activation process to request a new link.
- If that still doesn't work, contact your adviser or Client Services.

Login error or technical issues

If you see unexpected error messages or blank screens:

- Try accessing the site in a different browser (e.g., Chrome, Edge).
- Clear your browser cache and cookies.
- Retry the login from the main Novia Global website rather than a bookmark.

If the issue persists, contact Novia Global Client Services with details of the problem, including screenshots if possible, your username, and the device/browser you are using.

5. Keeping Your Account Secure

For your protection:

Never share your password or security question details with anyone.

Novia Global will never ask you by email or phone to confirm your full password or security answers.

Be cautious of suspicious emails or requests for personal information. If in doubt, contact Client Services directly.

6. Need More Help?

If you've tried the steps above and still need assistance with logging in, resetting your details, or activating your account, please contact:

Novia Global Client Services

Email: clientservices@novia-global.com
Phone: +44 (0)1225 517 517

Your adviser can also assist with many login-related queries and can verify your account details if required.

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