

Simple steps to registering on the Mutuals Society Portal



You can now register to use the Mutuals Society Portal to submit applications and returns for your society to the Financial Conduct Authority (FCA). This includes your annual return and accounts.

You first need to set up your account, and then associate your account with your society. This leaflet explains how.

1

Go to <http://societyportal.fca.org.uk>
You will see the following page:

Welcome to the Mutuals Society Portal

This portal enables mutual societies registered by the FCA to submit forms and obtain copies of registration documents. This includes submitting your annual return and accounts, changing your registered office address and changing your name.
Register for the portal or login to gain access to your society information.

LOGIN	REGISTRATION
<p>Username *</p> <input type="text"/>	<p>How to register</p> <p>Register as a user of the portal to get your own user account and password. From there, you will be able to associate yourself to a society. This means you will be able to submit application forms and annual returns on behalf of that society. This is for people involved in the running of the society, such as a society secretary, director or member of staff.</p> <p>If you are involved with more than one society, you can separately associate yourself with each one but you only need one user account to do so.</p>
<p>Password *</p> <input type="password"/>	
<p><input type="button" value="Login"/></p> <p>Forgot password?</p>	<p><input type="button" value="Register"/></p>

2

Click on 'Register' to create your own account



Registration

Fill-in your details below to create your user account for the portal.
The user account is unique to you. You should not share your password with anyone. Up to 5 people can be associated with any one society.
Once you have submitted your registration request you will receive a confirmation email. Click on the link in the email to confirm your details are correct and complete the registration process.

Required fields are marked with an asterisk (*)

Name * First Name Surname

Email Address *

Address Line 1 *

Address Line 2

Town/City *

County

Postcode *

Telephone Number *

Username *

Password *
Your password must be at least 8 characters long, contain upper and lower case letters, a number and a special character (e.g. !, ?)

Confirm Password *

Memorable Questions *

Select a question	Answer
Select a question	Answer
Select a question	Answer

3

You will see this message once you have successfully submitted your registration:



Registration

Registration successful.

You can now login to the portal. You will receive an email asking you to verify your email address. Please follow the instructions in that email to complete your registration. If you do not receive the email, login to the portal and click "Resend Verification". You can associate yourself with a society after you have verified your email account.

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Check your email inbox, you should find an email from us asking you to 'validate' your account. Please do this.



Ian Adderley -

RESEND EMAIL VERIFICATION

Please click the link that has been sent to your email account to verify your email and complete the registration process.

5 Log in to the Society Portal using the username and password you created.

6 'Associate' yourself with your society. If you are involved in more than one society, you can associate yourself with each of them. You will see the following webpage where you can enter the name or number of your society and then select 'Submit Request'.

The screenshot shows the 'Mutuals Society Portal' interface. At the top left is the FCA logo (Financial Conduct Authority). The user is logged in as 'Ian Adderley'. The main heading is 'REGISTER A NEW SOCIETY'. Below this, there are two buttons: 'New Co-operative Society' and 'New Community Benefit Society'. The section below is titled 'ASSOCIATE YOURSELF WITH AN EXISTING SOCIETY'. It contains instructions: 'Enter below the details of the society you wish to be associated with. Once associated with a society you will be able to submit application forms and annual returns on its behalf. You must have the permission of the society to do this. A maximum of 5 people can be associated with any one society.' It also states: 'When you ask to be associated to the society, the society will receive a letter providing them with details of your request (including your name). That letter will contain a one-time passcode that you will need to enter. The letter asks the society to provide you with this passcode. It must be used within 30 days.' A note mentions that if applying to be linked to a society without their authorisation, the society can use the passcode to suspend your user account. Below the text is a form titled 'Select a maximum of 5 societies' with five dropdown menus, each labeled 'Select Society'. At the bottom of the form is a checkbox: 'I confirm I have permission to make this request and consent to you sharing my name as explained above.' and a 'Submit Request' button.

7 Once you have submitted your association request, you will see the screen below.

The screenshot shows the confirmation page in the 'Mutuals Society Portal'. The user is still logged in as 'Ian Adderley'. A blue banner at the top says: 'You have a pending society association request. Please click here to complete your request.' Below this, a green message states: 'Your society association request has been submitted.'

This screen confirms you have requested to be associated with your society.

We will send you a letter to the registered office address of your society. This letter will contain a 'one-time-passcode'. You will need this code to complete your association (see Step 8).

Please make sure we have your correct registered office address. You can check it on the FCA Mutuals Public Register: mutuals.fca.org.uk

8

When you receive your letter go to societyportal.fca.org.uk and log in with your username and password. Then, from the blue bar on the screen, click 'please click here to complete your request'

9

Step 9 - You will see the screen below. Enter into the box the code from the letter. Enter the code exactly as it appears using capital and lower-case letters as shown in the letter

FINANCIAL CONDUCT AUTHORITY Mutuals Society Portal

Ian Adderley

Home Submissions

COMPLETE SOCIETY ASSOCIATION

OTP Code

Complete Association

That's it, you can now submit applications from the Society Portal for your society.

Simply select what you want to do from the 'I want to' drop down menu.

FINANCIAL CONDUCT AUTHORITY Mutuals Society Portal

Ian Adderley Select your Society: test society (OR)

Home Users Documents Submissions

The box in the top right of this page confirms the name of the society you are currently managing within the portal. If you are associated with more than one society, select which society you want to manage from the dropdown menu above.

Select what you want to do from the drop down menu below

I want to -- Please Select -- Start

What if I need help?

During the sign-up process, the portal will guide you through what you need to do. If you have any questions or you need help, please contact the FCA. Send an email to mutual.societies@fca.org.uk or call 0300 500 0597.

