CLIENT PORTAL

Client Access and Features

Overview

Retail clients have access to the platform to view their accounts, holdings and certain reports.

Audience

This document is intended for **Advisers** and **Support Staff**.

Requirements

Retail clients must have an open account on the platform before they have access to the client portal. An automated email is sent out to retail clients upon successful account opening informing them of their new platform account and providing a log in link where they can set their password for the first time.

Features

1. A client can view all of their platform accounts including holdings, book value, current value, performance, cash amount, fees, any pending transfers and pending trades.
2. The client has access to their transaction history, under **View Transactions** which details every action on their account such as trades, contributions, withdrawals and fees.
3. under **Account Fees** they can see an overview of the fees they are paying including any third party wrapper fees.
4. Under **Fund Your Account** the client can view the appropriate bank details and reference for sending any money to the platform. It is important that all transactions contain the account number reference to ensure speedy matching of monies. All pending transactions can be viewed.
5. Under **Download Centre** clients can view and download their platform application form summary.
6. Under the same tab, they can view and download **Valuations**, **Quarterly Statements** and **Annual Charges** to either PDF or Excel.
7. Clients have access to **My Documents** where they can upload documentation. All docs uploaded will be visible to the Advisers and Support Staff on that client's profile from their staff Tavistock logins. This is a secure and quick way from retail clients to share sensitive documentation. Advisers can also share documents with clients via the Documents tab under the client profile from their staff logins but they have the option to share with the client or simply keep on file with no retail client visibility.

Settings

1. In **My Profile** clients can view their personal details, change their password and switch on two-factor authentication.

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Contact Us

If you would like to learn more, please get in touch.

Call us on 0330 123 9830

Lines are open 8.30am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at investing@tavistockplatform.com

We aim to provide an initial response to your query on the same working day.

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