Servicing and managing clients transcript

In this video, we’re going to show some of the key features of the online platform. Let’s begin.

First things first, you need to log in.

This is your adviser dashboard and is where you can manage all your clients in once place. This dashboard will include all your ISA clients, even those where the ISA application wasn’t completed online.

The ‘in progress’ section gives an overview of incomplete and submitted applications as well as alerts on applications where more information is required.

You can download bulk valuations by clicking here.

This opens an excel spreadsheet with all the details of the valuation, unit price, number of units held and the current value.

What you’ll find particularly useful on the spreadsheet is the at-a-glance’ look at those clients who still have some ISA allowance left for the tax year.

You can also look at clients individually. Click on the client you want to view.

This will show all the information about their ISA, including current total valuation, any ISA allowance they have left to use, valuation history showing how the value has changed daily and a breakdown of the current valuation showing the funds, units/shares, price and value of each fund held.

You’ll also be able to submit some of the most common servicing transactions on your client’s behalf, such as adding in new money and requesting a one-off or regular withdrawal.

Some processes will continue to require a completed paper application form. We’ve added the ability to download forms for a switch and a change to a regular contribution from here also.