

Save time, go online with FPI Portal



Manage all of your clients' policies all in one place, securely and efficiently with FPI Portal. Offering 24/7 access, you can log in at any time from anywhere to:

Take action



Switching and redirection

Select the funds to change and the ones that the investment will switch and/or redirect to. Review and submit the instructions in just a few clicks.



Portfolio bond dealing

In a simple process, search and select new funds and submit online dealing instructions on your client's behalf.

Get in touch



Contact us via Portal's Secure Mailbox

Any confidential information or personal documents you send are protected making Secure Mailbox a much safer choice than email.

Review and track



View latest policy information

From current holdings to valuation reports, have instant access to your client's investment position and performance.



Combined client dashboard

Have a simple overview of your entire client portfolio making policy management quicker and easier



View transaction status

Any instructions submitted online will have an audit trail for your record-keeping.



Commission statements

Search and download commission statements by agency number or payment date.

[Login if you already have a Portal account or](#)

Sign up to FPI Portal >

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