

# 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 >](#)