

For professional advisers only

# James Hay Online Features

A tool to help you and your clients take full control of investments

James Hay Online offers a range of functional and highly intuitive tools, as well as a wealth of information to enable you and your clients to manage and monitor investments online.

## Products

- Modular iPlan – including:
  - Modular iSIPP
  - Modular GIA
  - Modular ISA
- Wrap – including:
  - ISA
  - Offshore Bond
  - SIPP
  - Investment Portfolio

## Tools

- eSignature (Modular iPlan)
- Online income changes
- Illustrations
- Online applications (Modular iPlan)
- Trade tracking
- Cash alerting
- Investment Manager money transfers

## Valuations & Reports

- Performance reporting
- Asset allocations
- Daily valuations
- Transaction history
- Transfer summary
- Contributions summary
- Adviser charges and commission
- Pension Input Period breakdown
- Income & PAYE

## Support

- Contact us
- Secure messaging
- Literature library
- Technical Hub

## Selftrade Trader Terminal

- Equity trade
- Market research
- Company data

## Investment Centre

- 3,700 funds
- Buy/sell/switch
- Free switching
- Bulk switching
- Regular investments and sells
- Fund research
- Model portfolio tool
- Rebalancing

## Client Management

- Cross client analysis
- Document store
- Change address
- Change personal details

## Home

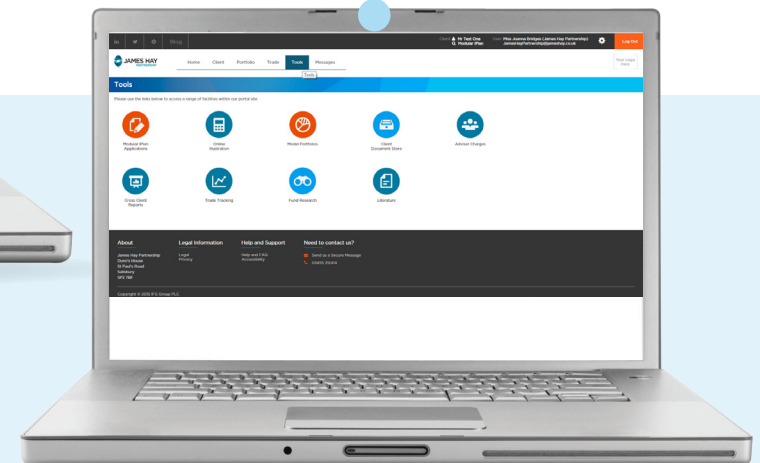
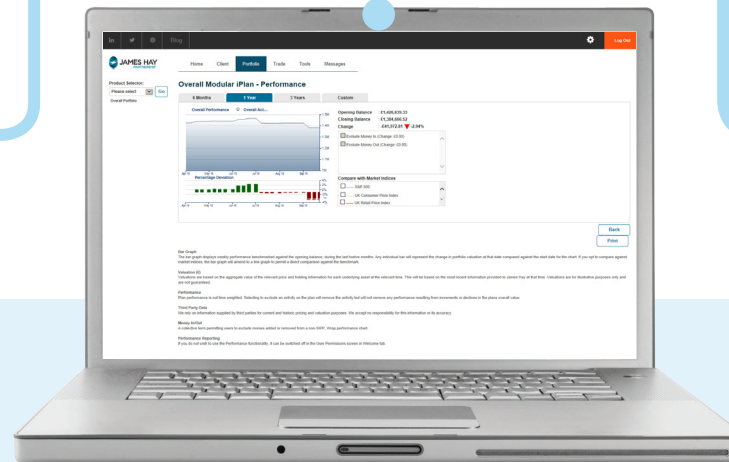
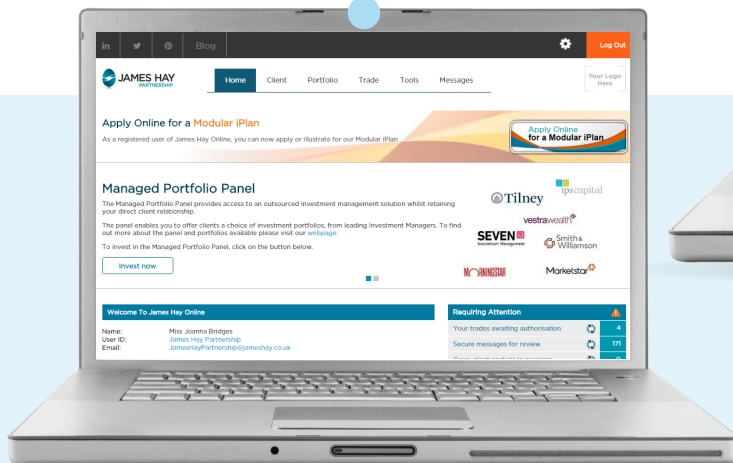
James Hay Online not only gives you control of your clients' portfolio 24 hours a day, 7 days a week but also holds details of your clients' investments in one place.

## Performance reporting

You can view an "at a glance" graphical view of performance, both at the plan and individual fund level. You can overlay a choice of indices to see how the performance compares to a benchmark and at the plan level, you can exclude events affecting the plan such as contributions and transfers in.

## Tools

With access to highly intuitive tools and a wealth of information, this online service is designed to help you manage your client's portfolio efficiently in a totally secure environment with access to a secure messaging service.

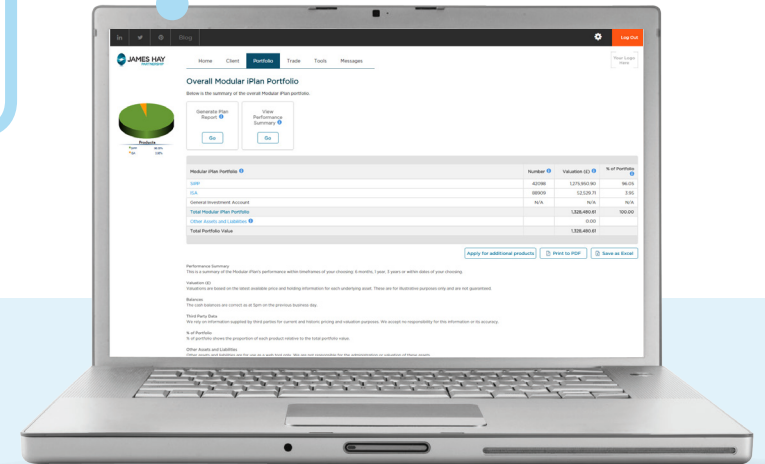
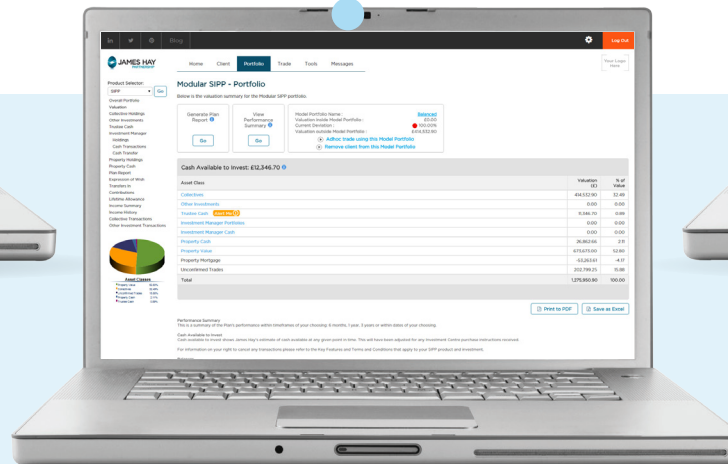
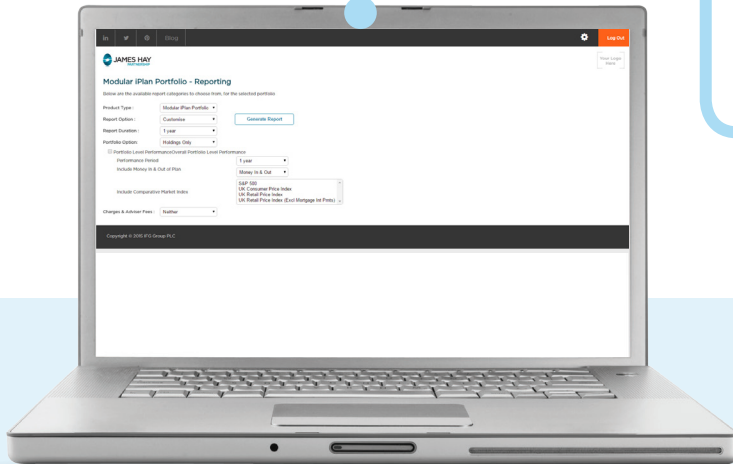


## Reports: The 'Plan Report' feature

This enables you to create reports using the information available:- see the example report on the James Hay Online link on the website homepage. These reports can be converted into a PDF or Excel spreadsheet and printed for you to use to present to your clients. The Plan Report captures the information your clients may need in one simple document.

## Portfolio

You can check your clients' holding and analyse the weightings of their savings at any time and correct any imbalances. You can view these weightings in a pie chart as well as table format.



# James Hay Online

## How to register

Simply complete the registration form which you will find on our website. The form includes the Terms and Conditions of registration.

**Step 1** Go to [jameshay.co.uk/portal](https://jameshay.co.uk/portal) and complete the Adviser Online Registration form.

You will receive a verification email from us.

**Step 2** To fully activate the account, a Registration Code will be sent to you in the post. Enter the code into the James Hay Online home page.

**Step 3** You can now gain access to all your clients' records through the Request Client Access tool in the 'What do you want to do?' section on the home page.

All client access requests will be validated before access is granted.

Contact us on:



**03455 212 414**



**[www.jameshay.co.uk](https://www.jameshay.co.uk)**



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