PLUG INTO FIRST CLASS SERVICE WHEREVER YOU ARE IN THE WORLD

With our online service centre you have access to one of the most sophisticated policy servicing systems in the industry - wherever and whenever you want it.

As a busy financial adviser always on the move, keeping in touch by mobile, laptop or tablet (or all 3!), having constant access to relevant information is a necessity.

Our award-winning online service centre (OSC) offers advisers comprehensive fund research facilities, a unique early warning dashboard, and superb, intuitive online switching and dealing. You can also access a detailed valuation and premium history for all policies.

And what's more, your clients with a RL360° policy can register too, enabling them to view valuations and make switches themselves. It is even possible for corporate pension trustees to provide their underlying client with OSC access.

The system is totally flexible and accommodates different business structures, that can be updated as and when people within your business change. Supporting different levels of access, master users have full control over the information that their staff can view. Master users can set up new users (and delete them) and choose exactly what access rights each user has. The system is totally flexible and accommodates different business structures. And you can change and update the structure whenever, and however, you want.

Servicing

Everything you need to know about all your RL360° clients and their policies is all available in the policy servicing pages. Our easy-to-use search function and product and policy status filters will help you find the policy (or policies) you wish to view. Once you have selected a policy to work with, you can:

- view a detailed policy summary that shows current policy value, policy status, current holdings and premiums paid, client/lives assured names and contact details
- view full policy valuations both current and backdated. You can also prepare a valuation in PDF format to email to your client
- view all transactions that have been carried out on the policy
- analyse all premiums and withdrawals over the life of the policy
- check personal contact details for all policyholders and lives assured
- receive advanced warning when something has changed or needs to be actioned, such as upcoming premiums or credit card expiry, through our unique dashboard function.

There's also a helpful bulk servicing page, which allows you to create your own "groups" of policies and then request reports, such as valuations. The reports will be emailed to you in moments, taking all the hassle out of monitoring policies and preparing numerous reports.

Switching and dealing

When it comes to switching and dealing the holdings in your clients' policies, you need a fast, reliable and easy-to-use system. On our OSC you can instruct:

- changes to the holdings of policies for which you currently have switching or dealing rights
- transfers of currencies to invest in alternative denominations, for onward investment
- how future premiums will be split between different funds
- a rebalance of your clients portfolios, based on the last set of instructions keyed online.

Fund research

You can search, analyse, monitor, and report with tremendous flexibility, and using a wide range of selection criteria. You can create shortlists, and generate client-facing portfolios and personalised reports.

Coming soon

We are currently working on a straight-through online application system. Initially this will be for our premier product, Quantum, though this service will eventually be rolled out to all our live products.

The app will enable advisers with Apple or Android tablets to visit clients in their homes and:

- fill out the application form on screen with your client. You can do this offline, there's no need for an internet connection
- collect all ID and Source of Wealth documentation and photograph (and certify) it on your tablet
- get your client to sign the tablet screen (no need for "wet" signatures)
- check you have everything and have completed all relevant sections (our intelligent verification system helps ensure this)
- upload the application (when you have an internet connection)
- submit it to us online, 24/7.

There's no printing or manual intervention required.

Not happy with that? Then just let your clients register for their own access to our dedicated online services.

These are just some of the reasons our OSC was awarded Best International Financial Adviser Portal in the Professional Adviser International Fund and Product Awards in 2013 and, more recently, Best Online Proposition in the Middle East at the International Adviser International Life Awards 2015.

Important notes

For financial advisers only. Not to be distributed to, nor relied on by, retail clients.

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You can count on us

RL360