

WHEN WE ADAPT AND EVOLVE, WE LEAD AND INNOVATE

GLACIER'S INVESTMENT HUB IS HERE

Simpler systems, automatic data capture and less paperwork
give you the power to get things done on your own terms.

THE 5 KEY FEATURES:

1. MANAGE

Manage client information easily by creating and maintaining details from one central place. Import clients from your own client management system and store a variety of client documents. Use the search filter or advanced search to find clients.

2. CREATE

Create model portfolios by selecting funds, allocating percentages and defining the risk levels and benchmarks. You can also analyse and compare different portfolios and wrap funds as well as create customisable reports to present to clients.

3. GENERATE

Prepare a quick quote or customised proposal for your client's new or current investment. Complete the application form through an easy to use web-based front-end that will guide you through the steps.

4. SUBMIT

Submit investment proposals and applications with a straight-through, paperless process and allow clients to sign digitally. When filling in information, you won't need to recapture data such as client details.

5. TRACK

An intuitive dashboard helps you manage your workflow and digitally track all your cases. The dashboard allows you to view previous actions and alerts you of any information or tasks that are outstanding.

YOU CAN ACCESS THE GLACIER INTERMEDIARY WEB, FEATURING THE INVESTMENT HUB, VIA SANPORT.

Tel: +27 21 917 9002 / 0860 452 364
Fax: +27 21 947 9210
Email: client.services@glacier.co.za

Website: www.glacier.co.za
Twitter: @GlacierBySanlam