

For professional advisers only

James Hay Online features

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:
 - Investment Portfolio
 - SIPP
 - ISA
 - Offshore Bond

Tools

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

Valuations & Reports

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

Support

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

EQi account access

- 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

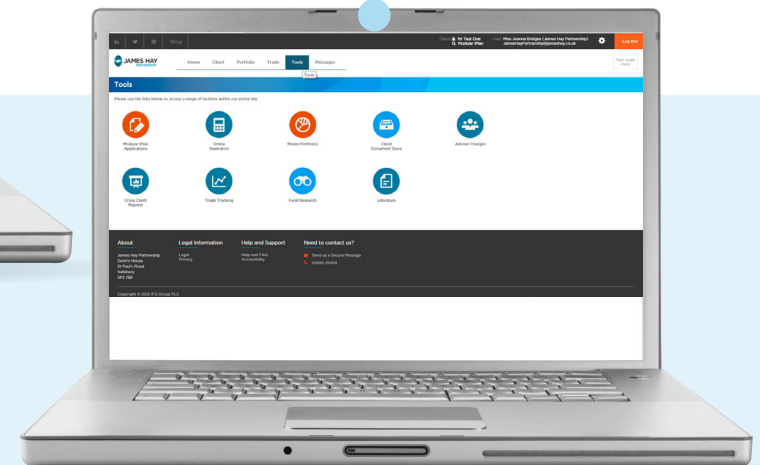
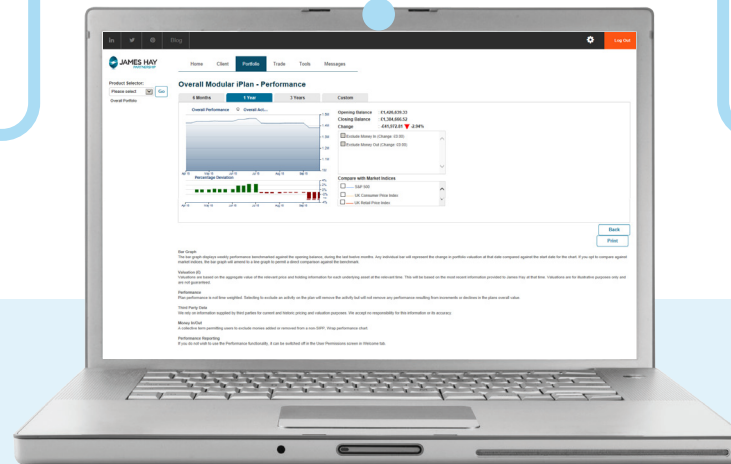
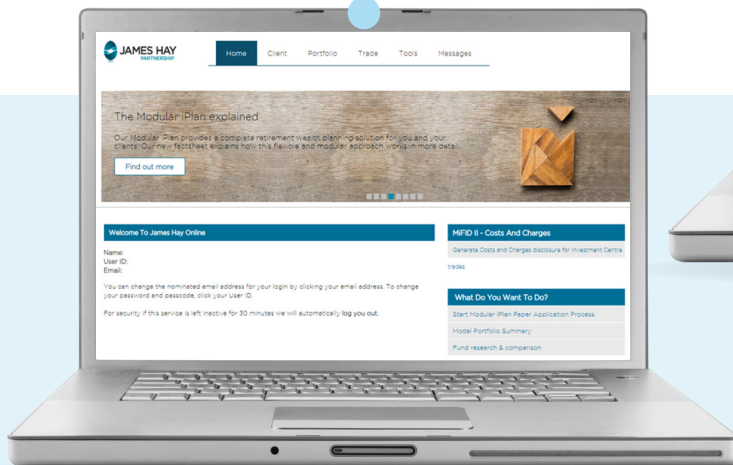
James Hay Online gives you access to all of your clients' portfolios and individual investments in one place.

Performance reporting

You can access 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 clients' portfolios efficiently, in a secure online environment, including a secure messaging service.

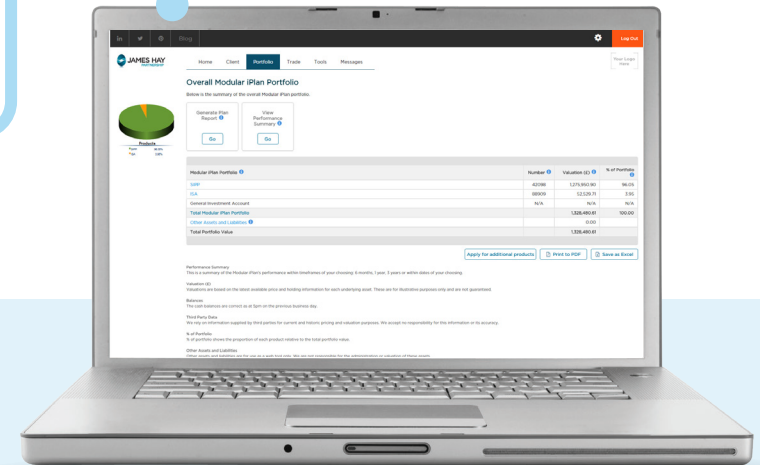
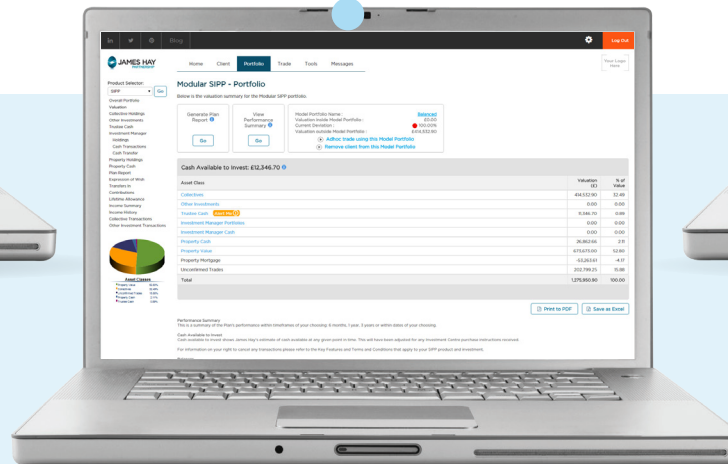


Plan Reports

This enables you to create reports using information from a client's portfolio. These reports can be converted into a PDF or Excel spreadsheet and printed for you to share with your clients. The Plan Report captures the information your clients may need in one simple document.

Portfolio

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



James Hay Online

How to register

Step 1 Go to **jameshay.co.uk**, click the Register button 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 access 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



James Hay Partnership is the trading name of James Hay Partnership Management Limited (JHPM) (registered in England number 02538532); James Hay Services Limited (JHS) (registered in Jersey number 77318); IPS Pensions Limited (IPS) (registered in England number 2601833); James Hay Administration Company Limited (JHAC) (registered in England number 4068398); James Hay Pension Trustees Limited (JHPT) (registered in England number 1435887); James Hay Wrap Managers Limited (JHWM) (registered in England number 4773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England number 7259308); PAL Trustees Limited (PAL) (registered in England number 1666419); Sarum Trustees Limited (SarumTL) (registered in England number 1003681); The IPS Partnership Plc (IPS Plc) (registered in England number 1458445); Union Pension Trustees Limited (UPT) (registered in England number 2634371). JHS has its registered office at Aztec Group House, 11-15 Seaton Place, St Helier, Jersey, JE4 0QH. JHPM, IPS, JHAC, JHPT, JHWM, JHWNC, PAL, SarumTL, IPS Plc, and UPT have their registered office at Dunn's House, St Paul's Road, Salisbury, SP2 7BF. JHAC, JHWM, IPS and IPS Plc are authorised and regulated by the Financial Conduct Authority. (3/21)