

WEALTH INTERACTIVE THIRD PARTY AND OTHER USERS MATRIX



A quick reference guide showing what functionality is available to each user role. A tick signifies functionality that cannot be changed. 'On' or 'off' shows the default setting but this can be switched either on or off per user.

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	EXTERNAL FUND ADVISER	EXTERNAL FUND ADVISER ACCESS MANAGER				
MANAGE USER ACCOUNT						
Create a new user		✓				
Set up and change users roles and permissions		✓				
Deactivate a user		✓				
Delete a user (archive)		✓				
Reset security settings online (own only)	✓	✓	✓	✓	✓	
Remind user of their username		✓				
MAINTAIN AND VIEW FINANCIAL ADVISER FIRM DATA						
Change bank account details		✓				
Maintain firm account details		✓				
View firm correspondence		✓				
CLIENT MAINTENANCE						
Set up a customer						
Search for a client	✓	✓	✓			
Maintain client details			✓			
View client details	✓	✓	✓			
CREATE AND MANAGE BUSINESS						
Accept a new investment			✓			
Maintain contract			✓			
Search for a plan	✓	✓	✓	✓	✓	
View client trading (deals) and cash history	✓	✓	✓	✓	✓	
View trade correspondence	✓	✓	✓	✓	✓	
View client non-trade correspondence			✓			
Request withdrawals			✓			
Approve increments/top-ups			✓			
Approve new applications			✓			
View client valuations	✓	✓	✓	✓	✓	
View transactional progress	✓	✓	✓	✓	✓	
View transactional history	✓	✓	✓	✓	✓	
Service clients from more than one adviser firm	✓	✓				

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	EXTERNAL FUND ADVISER	EXTERNAL FUND ADVISER ACCESS MANAGER				
FINANCIAL PLANNING AND PORTFOLIO MANAGEMENT						
Create and maintain a 'White List'		✓				
Create a portfolio	✓	✓				
Publish a portfolio		✓				
Use a portfolio	✓	✓				
Research available investments/assets	✓	✓	✓	✓	✓	
Review portfolio	✓	✓				
Link and unlink accounts to portfolios	✓	✓				
Bulk switching and redirection	✓	✓				
Trading (switching and redirection)	✓	✓	✓	OFF	OFF	
Issue deal instructions without authorisations	ON	ON	N/A	N/A	N/A	
Authorise deal instructions	OFF	OFF				
Request asset review	✓	✓	✓	✓	✓	
Create client report						
View client report			✓			
Create illustrations						
View illustrations			✓			
MAINTAIN AND VIEW COMMISSION						
View fund adviser fees		✓				
ADDITIONAL FEATURES						
Set and receive alerts	✓	✓	✓	✓		Available alerts depend on role

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Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Utmost Wealth Solutions is the registered business name of Utmost International Isle of Man Limited Singapore Branch.

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Registered in Singapore Number T08FC7158E. Authorised by the Monetary Authority of Singapore to conduct life assurance business in Singapore.

Member of the Life Insurance Association of Singapore. Member of the Singapore Finance Dispute Resolution Scheme.

Utmost International Isle of Man Limited is registered in the Isle of Man under number 024916C.

Registered Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

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