CONNECT

OVERVIEW CLIENT USER GUIDE

A WEALTH *of* DIFFERENCE

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INTRODUCTION

Connect, our innovative digital servicing platform, provides 24/7 secure access to a range of online features, available from any device including laptops and tablets.

With Connect, monitoring and managing your policy is easier, faster, more secure and more efficient than ever. Connect offers a wide range of functionality including accessing your policy details; updating personal information; checking your latest policy valuations, past quarterly statements and the performance of underlying investment(s).

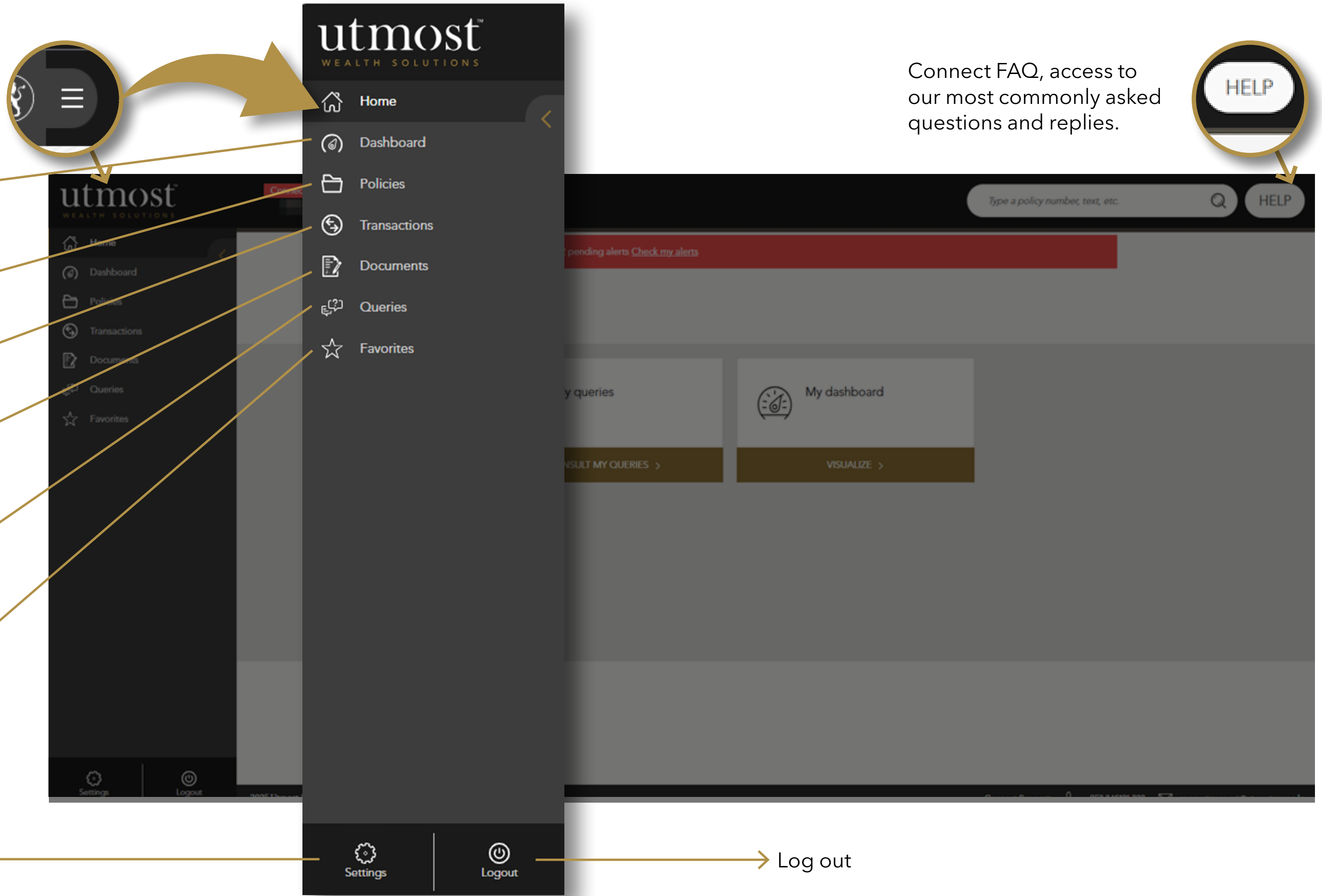
This user guide has been designed to help you navigate through the Connect platform and explain how to access the functionality available.

HOME PAGE

After entering your log in details, Connect home page is displayed.

Open the menu panel.

Connect FAQ, access to our most commonly asked questions and replies.



Find key information to monitor your policy transaction/servicing.

Policies: access to your policy information and (roles, structure, underlying assets, ...).

Follow up on your ongoing capital transactions (activities).

Consult your policy documents such as, quarterly valuation statements.

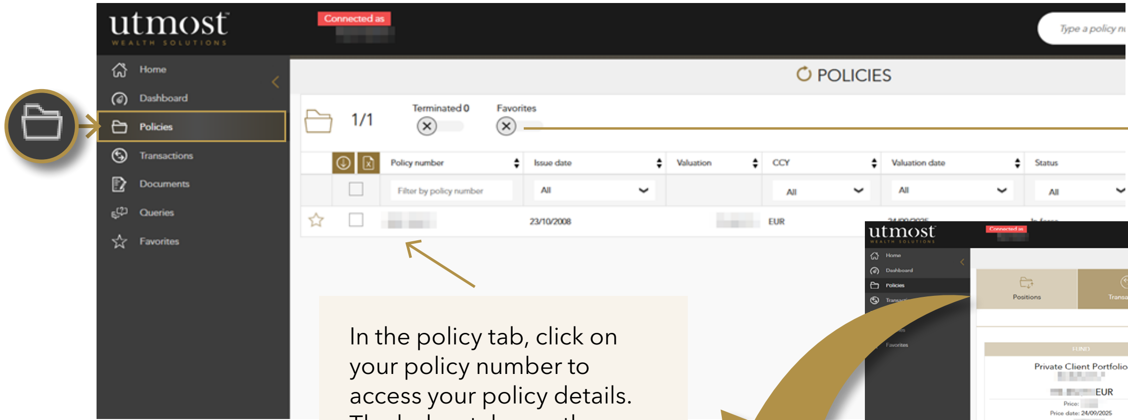
Send us a message or consult previous messages with us. Follow up on changes to your policy (change of client information, change of roles).

Quick access to your favorite policy, transaction, query.

Change language or number and date formatting.

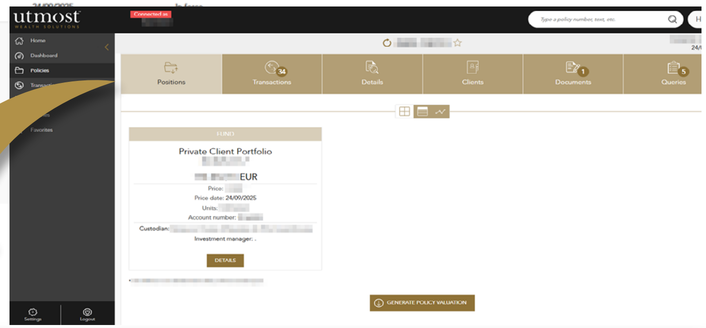
Log out

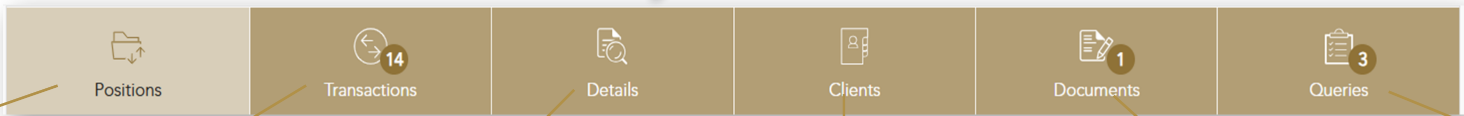
HOW TO CONSULT YOUR POLICY INFORMATION (PERFORMANCE, POLICY STRUCTURE, ...)



Click here to display any terminated policies.

In the policy tab, click on your policy number to access your policy details. The below tabs are then displayed and provide you with detailed information.





Review your policy performance and underlying assets.

Monitor your ongoing capital transactions and review past transactions.

Consult information about your policy structure and specific details such as tax country, country of law, total onboarding and lapses since inception.

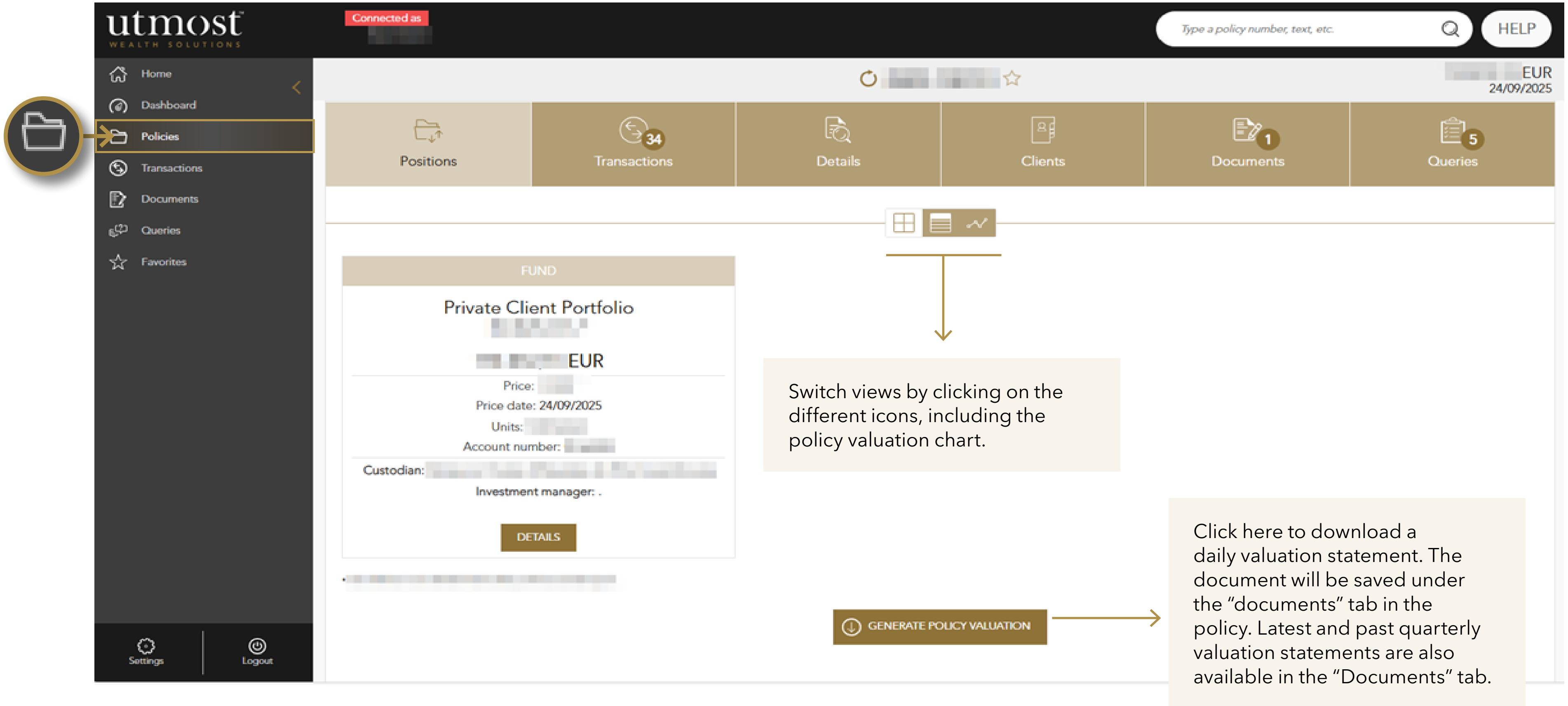
Display client details and their roles on the policy (detailed information is obtained by clicking on a specific client).

Display documents related to your policy (valuation statements, confirmation letters, ...). Click on the document to download it.

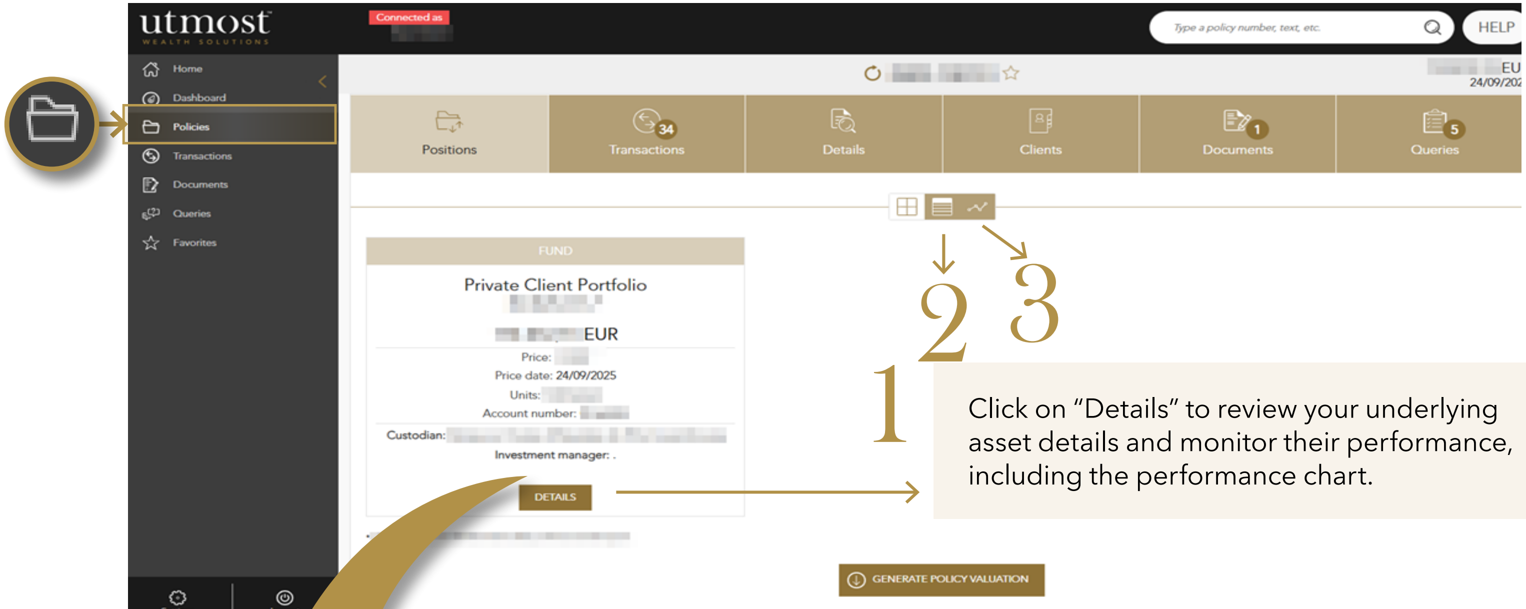
Display ongoing or completed servicing (change of client information, change of policy roles) and query (chat conversation).

HOW TO MONITOR POLICY VALUATION PERFORMANCE

The position tab displays the fund(s)/ product(s) of your policy.
Each Fund has a “Detail” button to consult your cash account status and monitor the underlying assets.



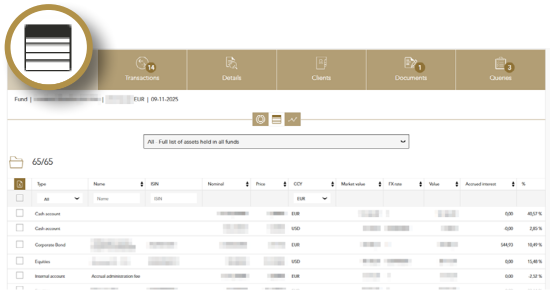
HOW TO VIEW THE UNDERLYING ASSET DETAILS AND PERFORMANCE



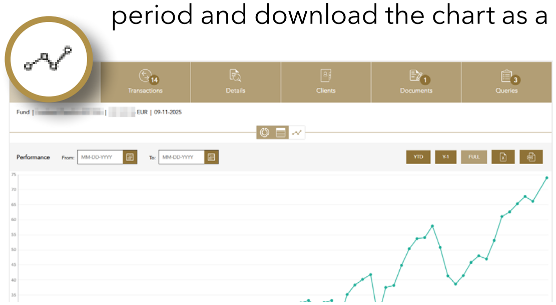
Click on "Details" to review your underlying asset details and monitor their performance, including the performance chart.

1. Review the split of your investments.

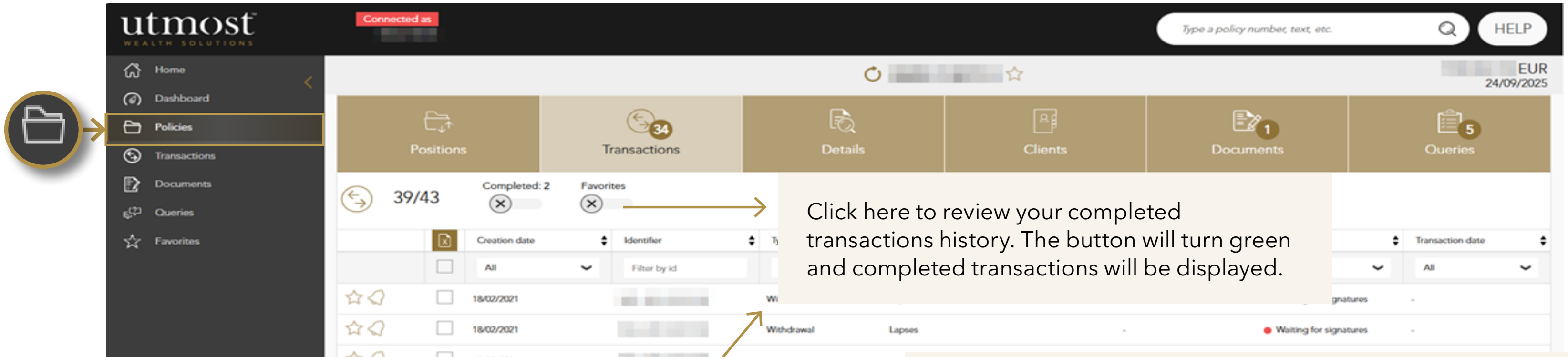
2. Click on the table symbol to view all underlying assets.



3. Click on the chart to consult the underlying asset performance chart based on official quarterly values. You can select a time period and download the chart as a PDF.

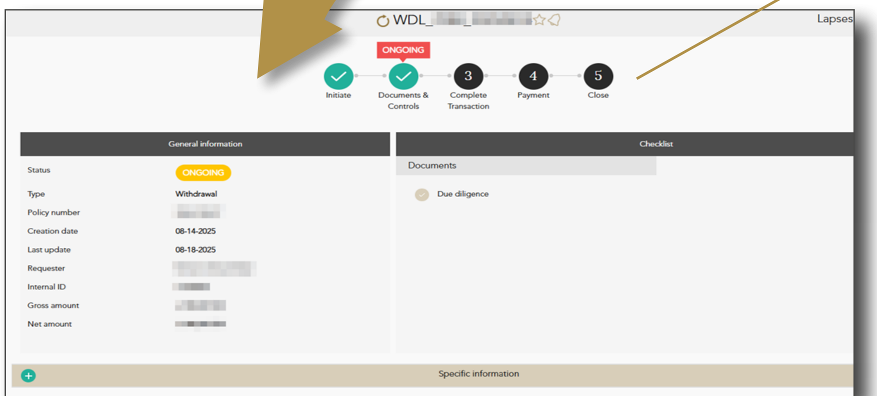


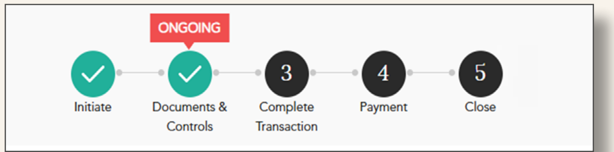
HOW TO VIEW A POLICIES TRANSACTION HISTORY



Click here to review your completed transactions history. The button will turn green and completed transactions will be displayed.

Click on the selected transaction to view its details and monitor progress.

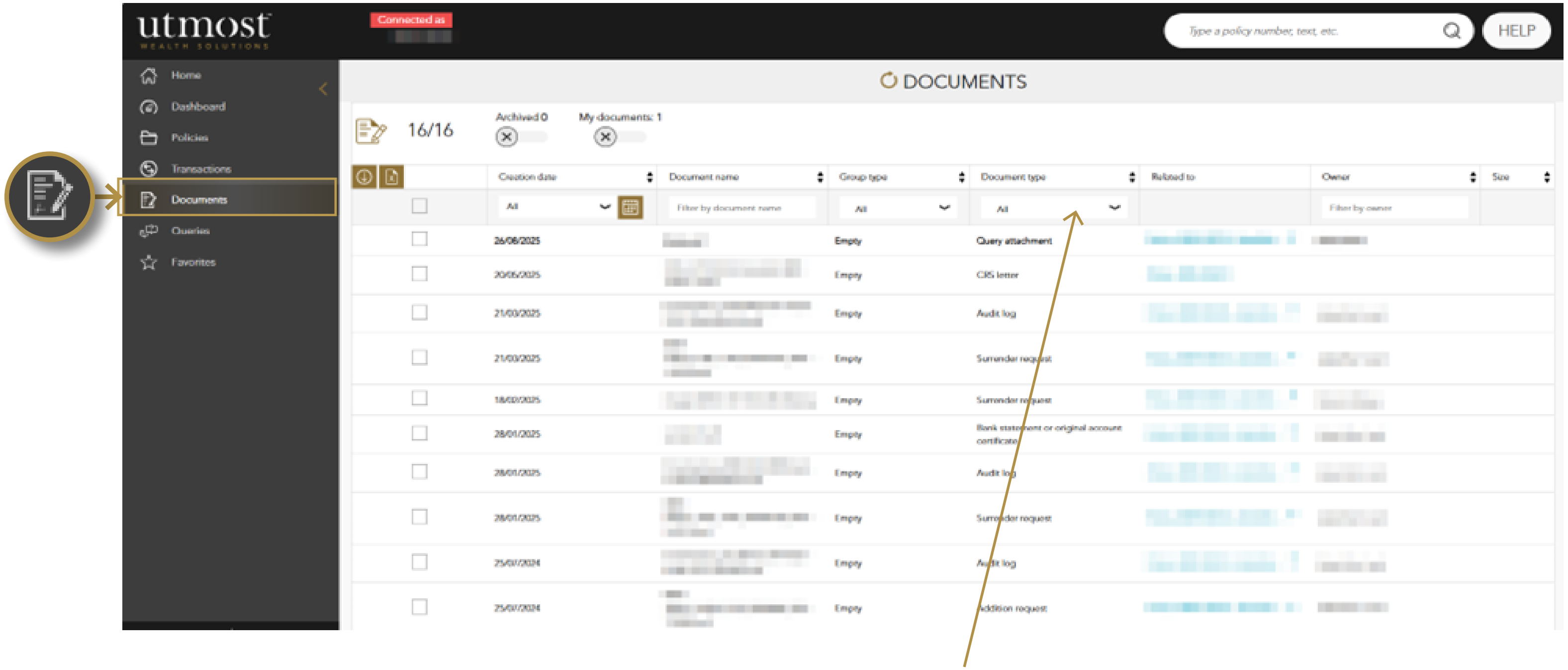




The menu at top of the display shows the different steps of the transaction process and their status. The current status is in green. The black color indicates which stage have not begun.

- "Initiate": completion of all steps to launch the request.
- "Documents & Controls": the request has been sent to the Partner & Client Servicing team who further controls the documents provided in order to approve the request.
- "Complete Transaction": the request has been approved and the transaction is being complete in our systems.
- "Payment": payment is in progress.
- "Close": the transaction is recorded and the confirmation letter is about to be published in Connect.

CONSULT YOUR POLICY DOCUMENTS AND DOWNLOAD YOUR QUARTERLY VALUATION

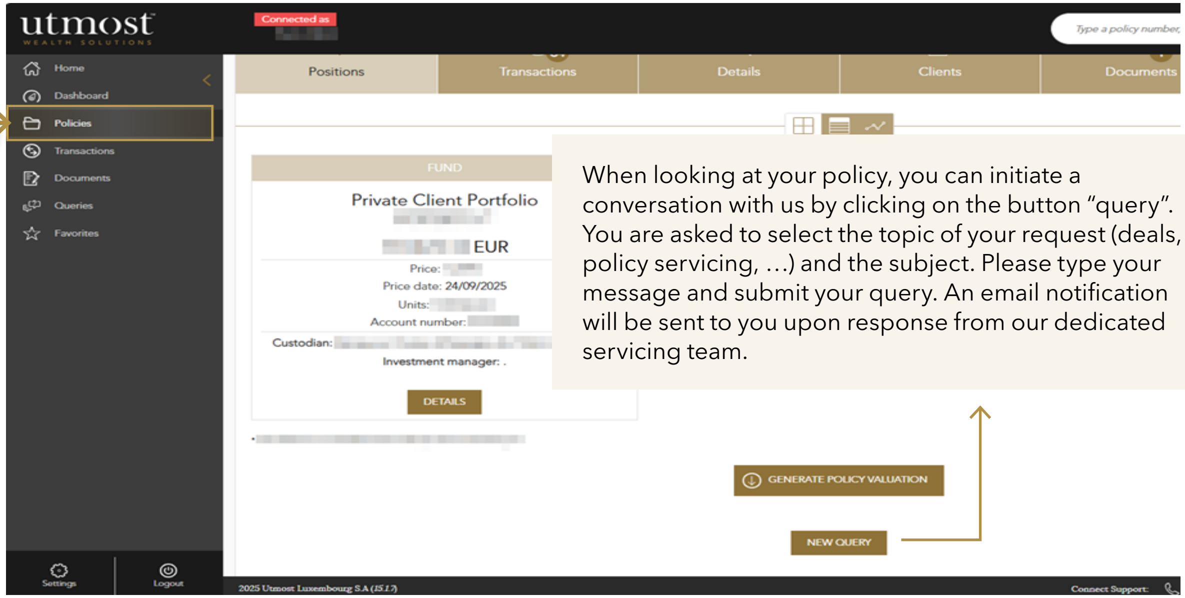


Documents related to your policy/ies are found in "my document" tab.
To ease your search, please use the document type filter.

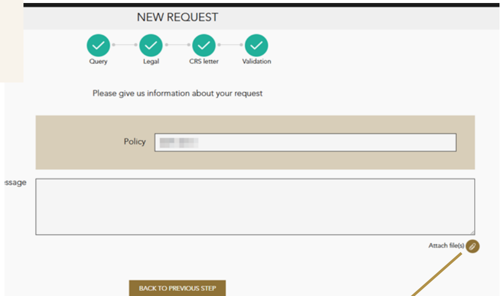
- Daily Valuation statements
- Quarterly valuation statements
- Attestation letter
- Confirmation letters for transactions
- Submitted transaction forms

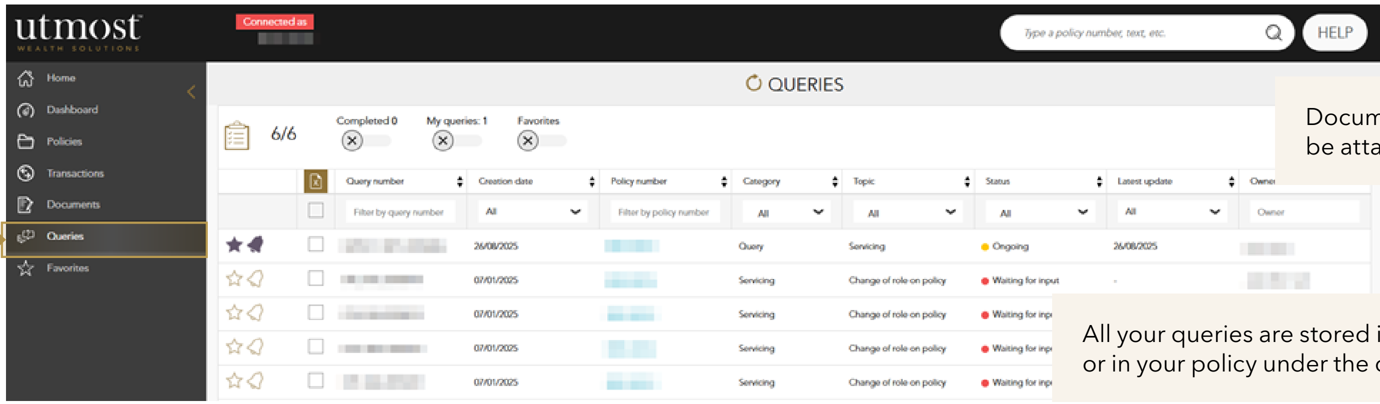
→ All documents can be downloaded by clicking on the "document name".

HOW TO INTERACT WITH YOUR DEDICATED PARTNER AND CLIENT SERVICES TEAMS THROUGH OUR CHAT (QUERY)



When looking at your policy, you can initiate a conversation with us by clicking on the button “query”. You are asked to select the topic of your request (deals, policy servicing, …) and the subject. Please type your message and submit your query. An email notification will be sent to you upon response from our dedicated servicing team.

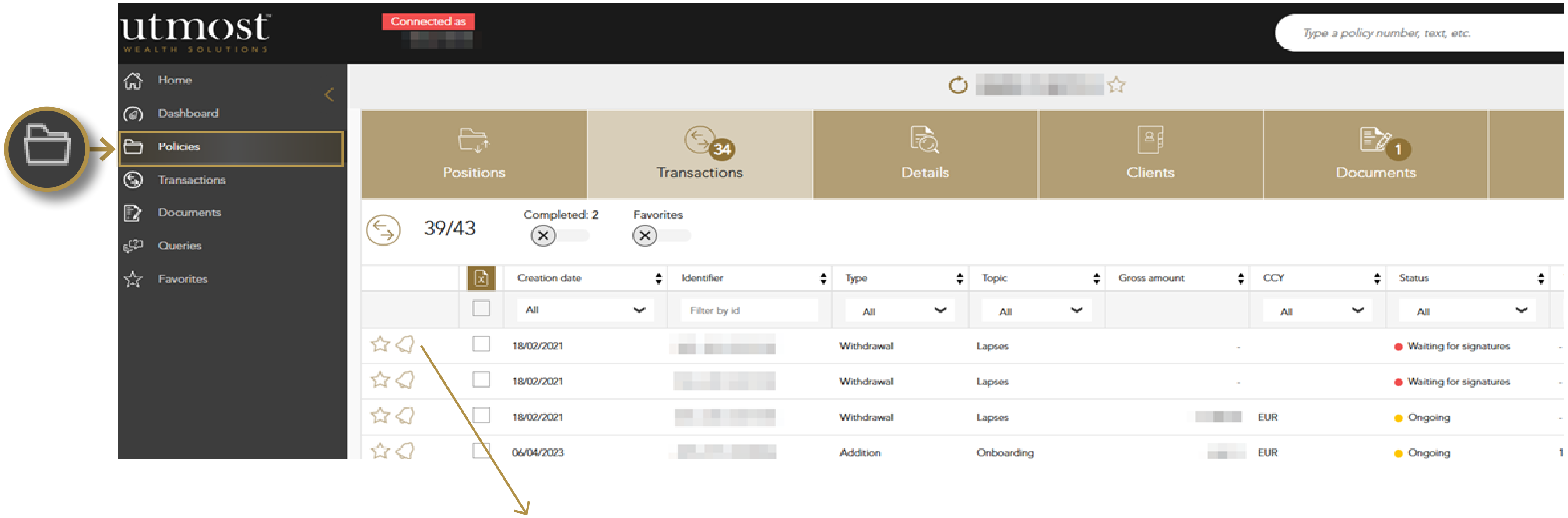




Documents up to 10 MB can be attached.

All your queries are stored in the Query tab of your menu panel or in your policy under the query tab.

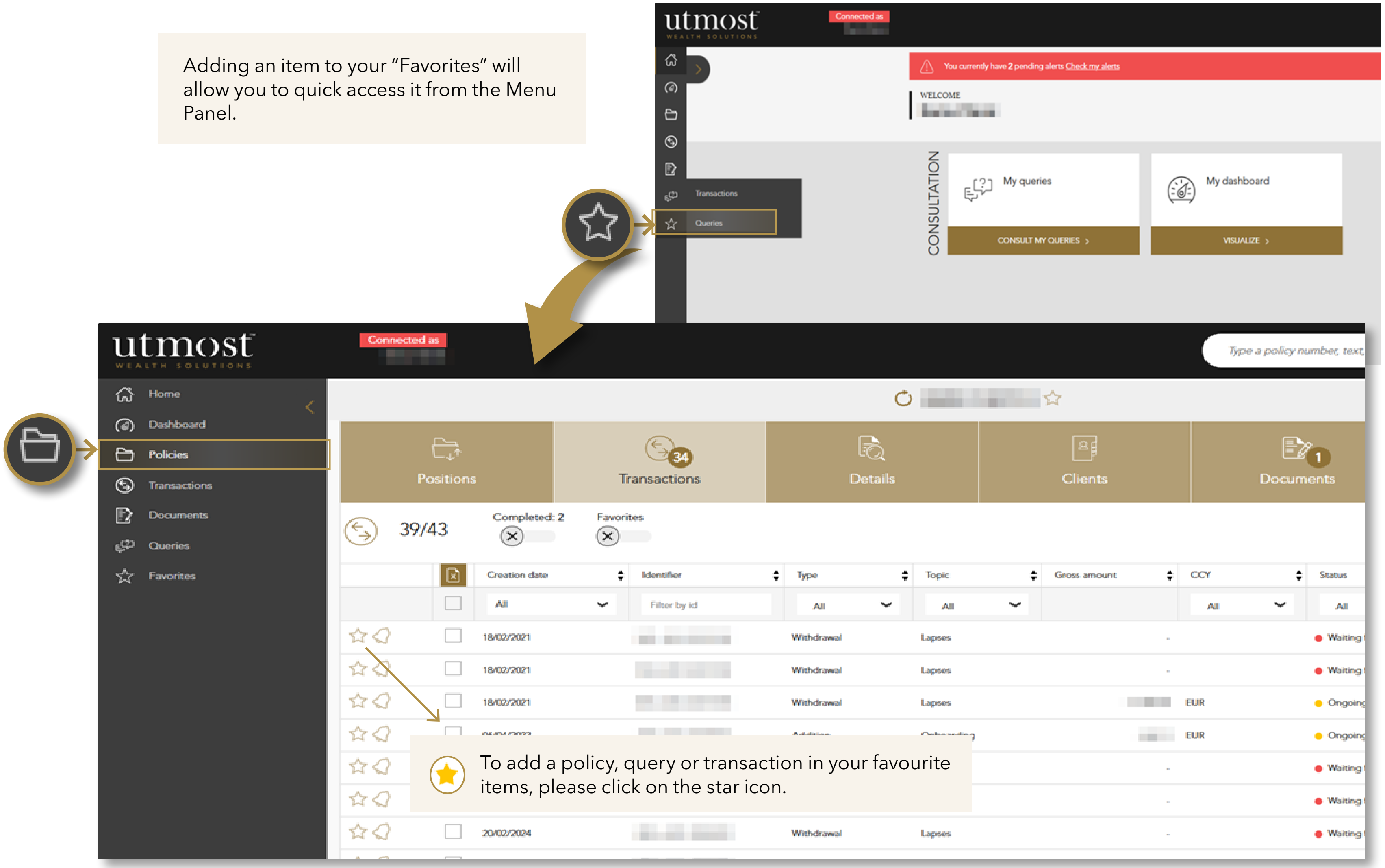
HOW TO KEEP TRACK OF YOUR TRANSACTION AND QUERY



To keep track on the progress of your transactions, please click on the bell icon. You will receive notifications by email of any status change on transactions where the bell has been selected. Please note this is also applicable to your queries.

HOW TO QUICKLY ACCESS A POLICY, QUERY OR TRANSACTION

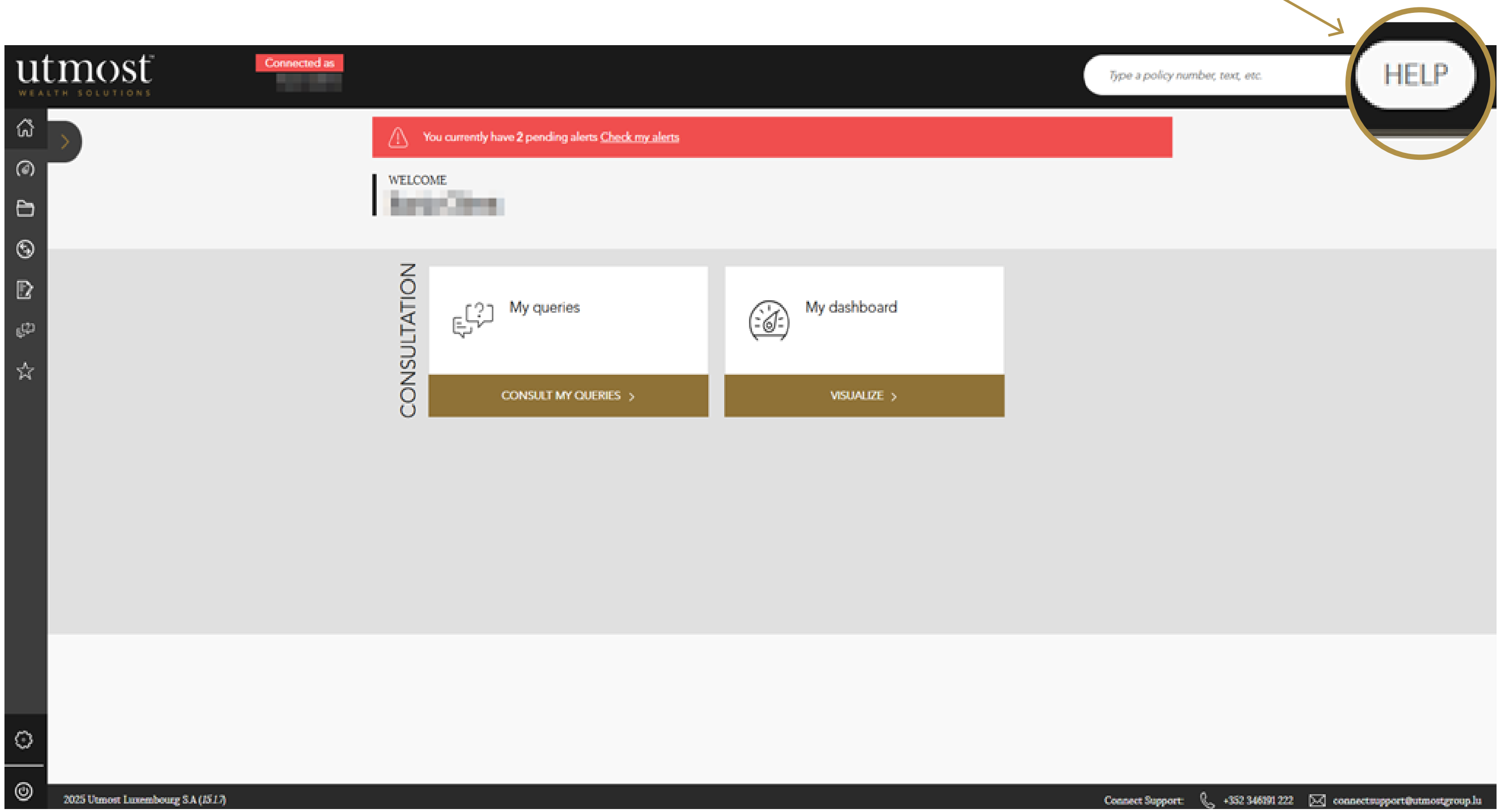
Adding an item to your "Favorites" will allow you to quick access it from the Menu Panel.



To add a policy, query or transaction in your favourite items, please click on the star icon.

NEED MORE INFO?

Don’t hesitate to consult the FAQ section of Connect.



If you didn’t find the information you were looking for,
please contact us **connectsupport@utmostgroup.lu**

Disclaimer

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