

IT'S EASY TO PRODUCE AN ILLUSTRATION ON WEALTH INTERACTIVE

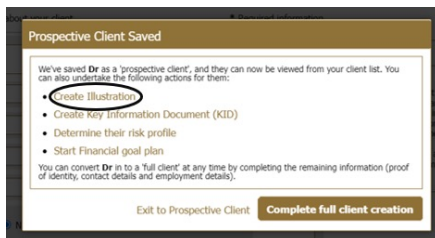
HERE'S YOUR EASY GUIDE TO PRODUCING AN ILLUSTRATION:

utmost[™]
WEALTH SOLUTIONS



It takes less than 10 minutes to produce an illustration on Wealth Interactive. Plus the data you input is saved and can be used to start an application – there's no need to enter the information again, saving you valuable time.

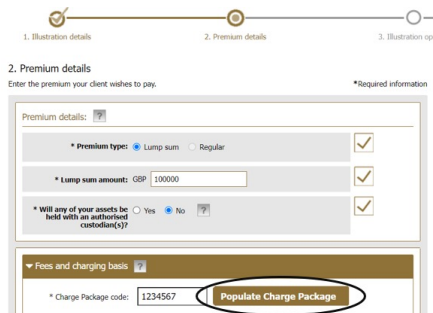
- › From your **'Clients'** page click on **'Create new client'**.
- › You'll be guided through the required fields – only four items of client information are needed to produce the illustration.



- › Your client will be created as a 'prospective client'.
- › Then select **'Create Illustration'**.

MORE THAN ONE APPLICANT?

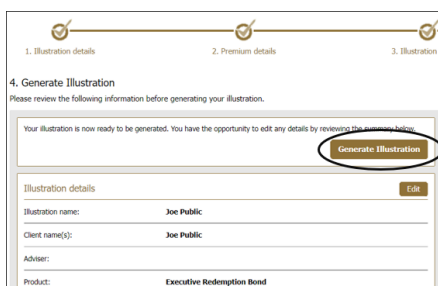
You'll need to create all applicants as prospective clients. They will then be available as 'existing clients' so you can link them to the illustration.



You will be prompted to:

- › input the premium details
- › select and allocate the assets
- › add any options required, for example withdrawals.

In the 'Premium details' section, enter the 'Charge Package code' and click on **'Populate Charge Package'**.



At the end of the process, click on **'Generate illustration'**.

YOU'RE DONE;

The illustration is now ready to view, download and share with your client.

INTEND SETTING UP A DISCOUNTED GIFT TRUST?

Once you have obtained the illustration for the bond you can contact **IOMsalessupport.uk@utmostinternational.com** for an indication of the discount that may be applied subject to underwriting.

IF YOUR CLIENT DECIDES TO GO AHEAD AND PURCHASE THE PRODUCT, IT'S EASY TO USE THE ILLUSTRATION TO POPULATE THE APPLICATION.

Home Clients Portfolios Assets Tools Literature

You are here: Home > Clients > Mr Joe Public

Mr Joe Public

This client is partially onboarded. **Complete registration**

Client actions: New investment Illustration Key Information Documents (KIDs) Tools

Policies (0)

There are currently no policies for this client.

Client details Recent transactions Planning R

Status: Prospective Client

Registration Status: Not registered

Date of Birth: 17/08/1988

- › From your '**Clients**' page, select the correct name from the client list and click on '**Complete registration**'.
- › You will be prompted to input the additional client information needed and to upload any supporting documents which may be required.

Confirmation

Thank you for submitting the details for Mr Joe Public, these have been received by Utmost International.

We are currently carrying out some checks against the information provided and whilst these checks are done, the client will be the status of: **Pending Client**

Once the checks are complete, the client will be made an **Active Client**, meaning you can carry out any action that you need

In the meantime, you can still undertake any of the below:

- › When you reach the 'Confirmation' screen click on '**Create New Investment**'.

Create Illustration / New investment

You can produce pre-sale illustrations on most products whenever you need them. You can then choose the appropriate one to turn into a new investment application. If you convert an illustration into an application, many of the details will feed through automatically, saving you valuable time.

You can produce pre-sale Key Information Documents (KIDs) on most products whenever you need them. You can produce multiple KIDs for a client and then choose the appropriate one to turn into a new investment application.

Create New Investment Create Illustration Create Key Information Document (KID)

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Use an Illustration/Key Information Document (KID)

Do you wish to use an existing illustration/KID for this new investment?

☐ Do not use illustration/KID

☒ Use Illustration/KID

Saved illustrations/KIDs

Search for Illustration/KID name or ref Search

- › Choose the option '**Use an existing illustration**' and select the illustration you'd like to use.
- › The application will be automatically be populated with the details from the illustration – saving you time and enabling you to efficiently complete the application before submitting it to us.

If you need any help with Wealth Interactive, or have any questions, contact your usual Utmost International representative, or **www.utmostinternational.com**

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

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

Utmost International Isle of Man Limited is registered in the Isle of Man under number 24916C.

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Utmost Wealth Solutions is registered in the Isle of Man as a business name of Utmost International Isle of Man Limited.

Utmost PanEurope dac is regulated by the Central Bank of Ireland. Registered No 311420.

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