



Viewing Member Insurance Records Help Guide

Viewing insurance accounts across all clients under an adviser

1. Click on *Reporting*, then *Insurance Accounts*

The screenshot shows the Acclaim Wealth dashboard. The navigation menu at the top includes: Home, Clients, Portfolio Management, Activities, Reporting (circled), Product, Support, and Access. A dropdown menu for 'Reporting' is open, showing options: Contribution Summary, Financial Planning Software Registration, Insurance Accounts (circled), Unit Prices, Term Deposit Maturities, and Adviser Fee Report. The main content area features a 'Client Search' section with a search input field and buttons for 'DISPLAY ALL CLIENTS', 'FAVOURITES', and 'RECENTLY ADDED'. There is also a 'Links' section on the right with options like 'Activity Management' and 'Upload Documents'.

2. Under Select Adviser, a drop down will appear. Select *all* or adviser of choice.

The screenshot shows the 'Insurance Accounts' page. The breadcrumb trail at the top reads: Home > Reporting > Insurance accounts. The main heading is 'Insurance Accounts'. Below this is a 'Select Adviser' section with a dropdown menu showing 'All' (circled) and a 'Search' button.

3. Clients in the Acclaim product suite who hold insurances will be visible as per the below table. The description, premium information and renewal dates are visible in this table. Insurance Accounts will appear as shown below.

The screenshot shows the insurance records table. At the top, there is a 'Select Adviser' dropdown menu with 'All' selected and a 'Search' button. A 'Filter' button is also visible. The table contains the following data:

Account Name	Account Type	Policy Number	Insurance Description	Policy Status	Premium	Payment Frequency	Insurance Premium Advice Fee	Commencement Date	Next Renewal Date
Pelagia Grant A0200732	Super Acclaim Super	200554	Acclaim Group DTPD NS WC	Current policy	\$486.00	Monthly	0.00%	10 Aug 2022	31 Dec 2022
Pelagia Grant A0200732	Super Acclaim Super	200555	Acclaim Group IP 2Y 60D NS WC	Current policy	\$183.83	Monthly	0.00%	10 Aug 2022	31 Dec 2022



4. You may also filter your view by Insurance Policy type and/or Account Type.

Select Adviser

All

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Filter Results By

Policy Type
(All)

Account Type
(All)

Page size: 10

2 items in 1 pages

