Viewing insurance accounts across all clients under an adviser

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

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

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.

Select Adviser

All   Search

Filter

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		Search						

Filter Results By

Policy Type
(All)

Account Type
(All)

Reset   Apply

Account Name	Account Type	Policy Number	Insurance Description	Policy Status	Premium	Payment Frequency	In Pr Ac
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