The Retirement Account Dashboard

How do I buy, sell, switch investments

Hints and tips for placing investment trades online via The Retirement Account Dashboard.

Before you start

Have your **ISIN**, **SEDOL** or **Citicodes** ready to make searching for your funds simple.

There may already be trades in progress – if this is the case you will see a **timer icon** next to the funds. You will be able to process your trade as soon as this has settled.

Clients will receive a letter confirming what investment trades have been made, as well as contract notes. These are sent by post.

Accessing servicing information from dashboard home page

- Search for your client and then select **view**
- In the **products** section, click on the link **'The Retirement Account'**
- In the **Pensions Savings** area click on **ACTIONS +** and choose the task you wish to perform

How do I.....

Buy investments from cash*

- Enter the amount of cash you want to use to purchase funds
- To select a fund which is not displayed, click on **select investments** and choose the relevant fund
- Specify the % of cash to invest into each chosen fund (must add up to 100%)
- Select **buy from cash**
- Review transaction information
- To proceed select **execute buy**
- If you want to make an amendment or do not want to proceed, select **cancel**

*Cash must be available. This can be checked in account holdings.

Sell investments to cash

- Select method for selling funds – **percentage, £** or **units**
- Select amount to sell (sell all or specified amount)
- Select **sell to cash**
- Review transaction information
- To proceed, select **execute sale**
- If you want to make an amendment or do not want to proceed, select **cancel**

Handy hint!

Take a screen shot before confirming the instruction to save for your records

Switch investments

- Select method for switching funds – **percentage, £** or **units**
- In the lilac **switch out** section, enter the % / £ / units to switch out of
- In the green section, select how much (%) to switch into each fund
- To select a fund which is not displayed, click on **select investments** and choose the relevant fund
- Select **execute switch**
- Review transaction information
- To proceed select execute switch
- If you want to make an amendment or do not want to proceed, select **cancel**

Need further support?

User guide
A detailed user guide covering all functionality available via The Retirement Account Dashboard is available **here**.

Call us
0800 032 7689
Monday – Friday 9am to 5pm

Email
ifaservice.ra@canadalife.co.uk

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