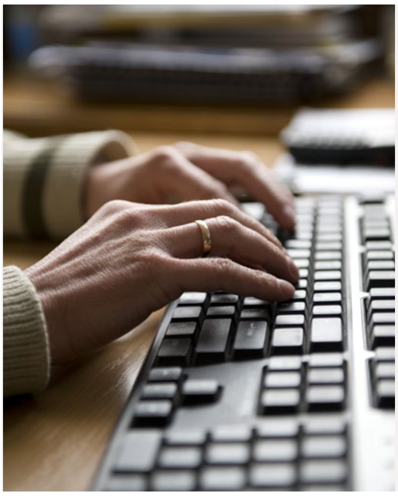
The Retirement Account Dashboard

How do I view my client data in one place?

Hints and tips for viewing client data online via The Retirement Account Dashboard.



Within The Retirement Account Dashboard, you can download your client information into an Excel format.

The benefit of downloading data in this way is that you can:

- View a summary of all your clients in one place
- View useful information about your client's policies in one place
- Quickly find clients who meet specific criteria, such as:
  - Who is invested in a certain fund
  - Who is invested in accumulation/ drawdown
  - Who has a guaranteed annuity

It's easy to do – within the main dashboard, scroll to the bottom of the page and click on **Download of all client data.** A CSV file will be created which can be opened and saved as an Excel file. Please note, this is done on an adviser by adviser basis.

Download of all client data

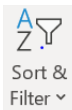
Information contained within the spreadsheet includes:

Client information	Product information	Investment information	Charges
Name	Product type	Total investment amount and value	Adviser charges
Tax code	Account number	Regular contribution details (amount, frequency, next contribution date, escalation)	DFM charges
	Account start date	Regular income details (amount, frequency, next payment date)	Product charges
		DFM details	
		Model portfolio details	
		Funds invested in (including name, code, units, values)	

Here's some tips on how to filter the spreadsheet:

- Highlight the first row (1) and in the **Home** tab, in the **Alignment** group, click **Wrap Text**

- Widen the column widths to suit your viewing preference
- Click into one of the cells in row one and in the **Home** tab, in the **editing** group, click **Sort and Filter** (you can then filter on each column)



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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