



ROBERTSONS
& CRAWFORD
— INDEPENDENT FINANCIAL ADVISORS —

Client Portal



Secure, Tracked & Organised

powered by  moneyinfo

A clear, uncomplicated view of your finances in one place. Your investments, savings, pensions, insurances, mortgages, loans and property alongside all the associated paperwork.

On your desktop and as an app on your tablet and smart phone, your finances are beautifully brought together under a single login accessible to you at any time, wherever you are.



With the **Client Portal** you can



View your investment portfolio



Quickly access your insurance details



Track your property values



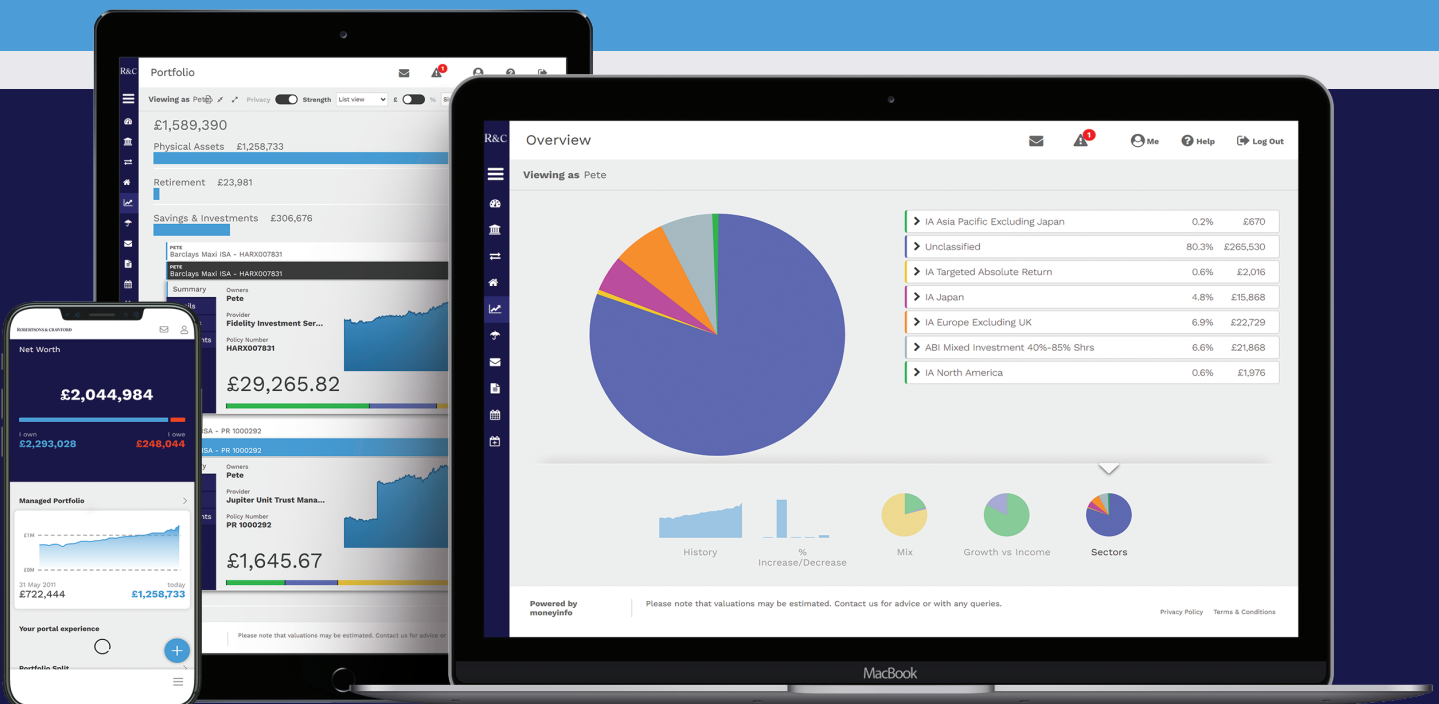
Manage your income and spending



Safely store all your important documents

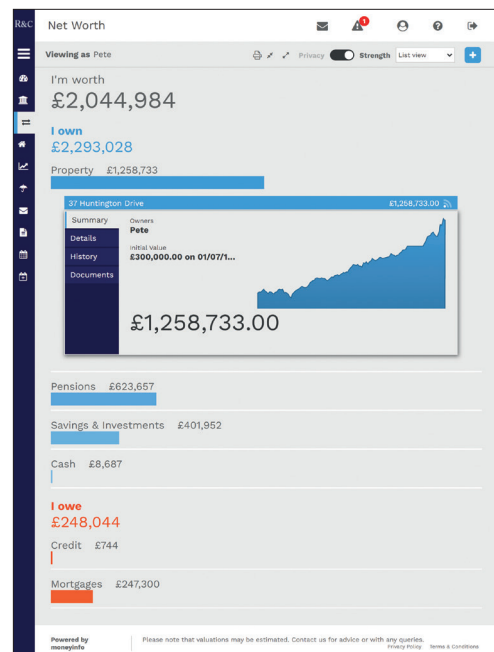


Be reminded about your renewals, income and payments



Keep track of your investments

The **Client Portal** makes it easy to see how your investments are doing. Valuations are updated daily and build into a history across your entire portfolio.



Everything summarised

Your dashboard gives you a snapshot of your entire financial life and an easy navigation point to everything you need. Personalise it to display the information that matters to you most.

Your personal financial assistant

Keep an eye on upcoming renewals, payments, income and maturities. Add your own key events such as MOTs, road tax and HMRC payments.



Keep your important documents safe



Store all your paperwork including wills, property deeds, insurance contracts, policy documents, valuations and statements. The **Client Portal** keeps your important financial documents safe, secure and accessible.

Your Robertsons and Crawford adviser can share documents and reports with you so you can read them when it's convenient. Simply log in to the **Client Portal** from any device and your important financial documents will be there waiting for you.



Your property valued

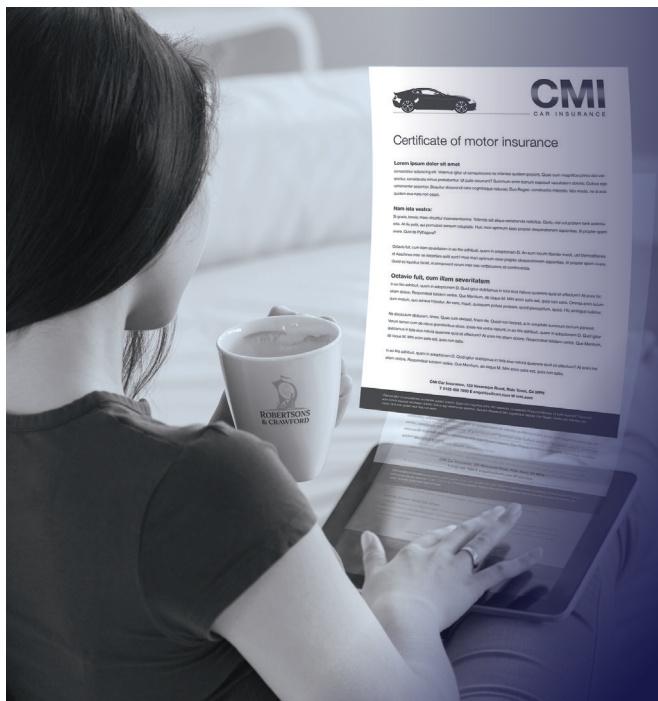
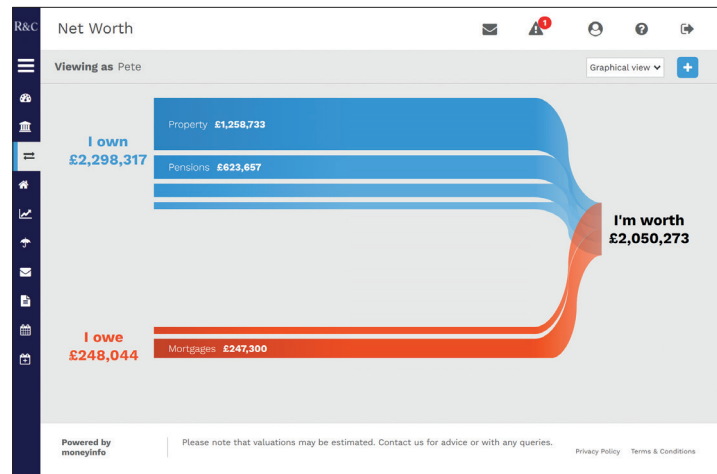
Want to know what your home is worth? Enter your house number and postcode and the **Client Portal** will display your property details and track its value using Land Registry data.

The Robertsons & Crawford Client Portal



A true picture of your net worth

The **Client Portal** tracks the value of your assets and liabilities over time. For you, your partner, your dependants, your trusts, your companies: all brought together into a single view.



Access your insurances when you need them

Your policy details are stored next to the things they relate to. Your home insurance next to your home, your car insurance next to your car. The **Client Portal** reassures you that in the event of an emergency you can access the information you need quickly and easily.

Secure and timely communications

The **Client Portal** ensures that your personal data is exchanged using only the most secure methods. Notifications alert you when important messages or documents are waiting to be read.



Enhanced privacy controls

Our privacy controls allow you to decide who your information is shared with, for example your partner or your Robertsons and Crawford adviser. Set your privacy defaults when you first log in and easily change this for individual financial items you add to your account.

Client Portal ensures that you are always in control of your data.



Your data is always protected

We take the security of your personal and financial information very seriously and The **Client Portal** makes sure that your data is safeguarded using bank level security and encryption. Our mobile app is further protected with your own six-digit pin and registered to your personal device.

And finally, for your peace of mind

If an emergency situation arises, where will the important details about your assets, liabilities, property and insurances be found?

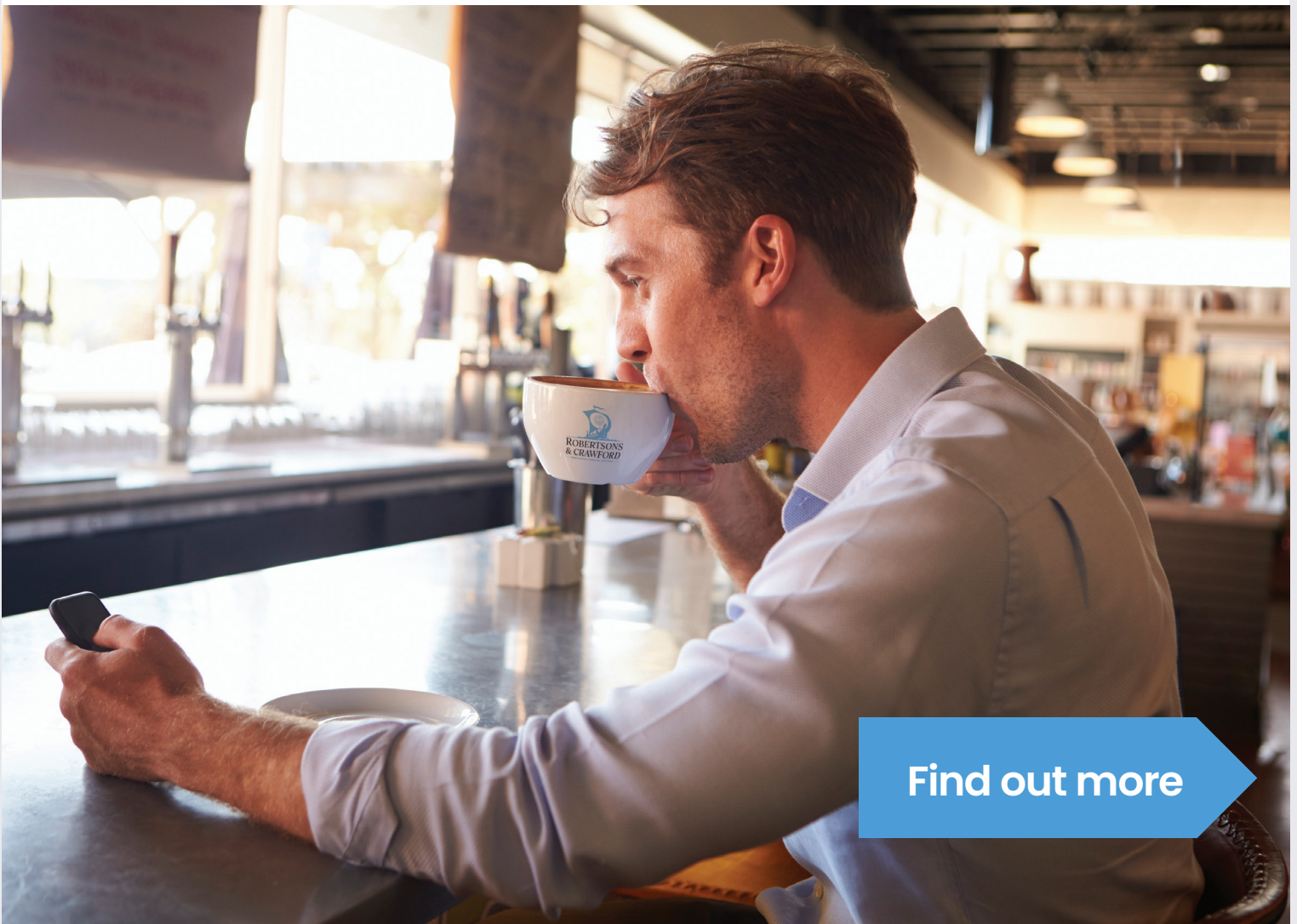
The **Client Portal** brings all this information together in one place with all the associated paperwork, making it accessible should it be needed.





Putting you **in control of your finances**

- Your personal digital filing cabinet with all your finances organised and updated.
- It's financial peace of mind in your pocket, knowing that your most valuable records are safe and accessible.
- No need to log on to multiple financial sites, helping to reduce the risk of online fraud.
- Access your information when you need it from any device.



[Find out more](#)

Testimonials

"For the first time I can see what I'm worth. I can see my home going up in value, as well as what my savings are doing. I feel in control, and I feel more confident making important financial decisions."

"Now I only have to remember one login to access all of my important financial accounts and documents."

"The Client Portal provides me with a helicopter view of all my finances and the detail when I need it. I love it."

"It's great being able to see all of my recent transactions in one place rather than logging into several different websites."

Access your online portal today
robertsonsandcrawford.moneyinfo.co.uk

Call 0118 207 5009

Email portal@robertsonsandcrawford.co.uk

Visit robertsonsandcrawford.co.uk

