helping you write business

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Alison Everett explains how the online functionality of Selestia Investment Solutions is designed to simplify the process of writing new business.

Selestia Investment Solutions has been designed to make doing business with us as easy as possible. We understand that you should only have to key information once – and then be able to use it again and again. The system also validates the application at every stage to reduce the margin for error and ensure business is issued quickly.

create a client

The first step in writing business is to create a client. Selestia Investment Solutions places the client file at the centre of processes. When you have input the client's details (name, address, date of birth etc.) once, you can use them each and every time you want to transact business. All records for the client are linked to the client file to give you a centralised audit trail.

application process

Once the client has been created you can choose the product, and this decision determines the questions you will be asked in order to complete the application process.

The first stage of the application process asks you all the questions required to create an illustration, including:

- contribution types and amounts
- the commission and charge details
- product feature options such as phased investment, rebalancing, switch commission and withdrawals.

You also need to choose the funds for the product. This can be done in a number of ways:

- **Select funds** – choose from our full list of over 950 funds.
- **Existing portfolio** – you can choose to create portfolios at master user level and publish them to the rest of the firm. For example, your firm could create Balanced, Cautious and Aggressive portfolios and manage them centrally so clients are grouped rather than managed individually.
- **Build portfolio using our risk profiler** – you can use our investment tools to determine attitude to risk and asset allocation and to research our funds.

At this point you will be able to create the illustration, analyse the underlying assets of the portfolio or print off a draft client report. You will also have access to a selection of documents that you may need to support the application process, such as Key Features, Fund Lists or Transfer Authorities.

supporting your recommendations

The final stage of the application process asks you how the client would like to pay for their contributions and summarises the application. You will be able to print off the Client Report – a full summary of all the steps you have taken in building your client's application to support your recommendations.

When you are satisfied that the application is complete, and the client has agreed to the declaration, you simply click 'submit' and the application is sent to Selestia Investment Solutions for processing. You will receive a confirmation e-mail that the application has been submitted. ■

accessing Selestia Investment Solutions

If you would like to take advantage of the new services available on Selestia Investment Solutions simply visit www.skandia.co.uk

Existing Selestia users can log on using their normal user details. If you are not already registered with Selestia, please follow the links to register online.

For more information on our services, please contact your Skandia regional office. Alternatively, please contact our E-Commerce Helpdesk – details can be found on the back page of informer.