

bordier | 1844

in touch

We are pleased to introduce our secure client web portal which has been designed to make it easier for you to access information about your investments with Bordier UK.

You can log on at any time of day using your PC or laptop at home or work, and on-the-move using any mobile device.

Logging on for the first time

When you are first registered for the service you will be supplied with a username (usually your email address) and two temporary passwords which you will be asked to change the first time you log on.

The link to the secure client web portal can be found at the top of the www.bordieruk.com Home page labelled "Client login".


If you have any issues with connecting to the service using your web browser, please contact our Client Services team (contact details can be found at the back of this leaflet).

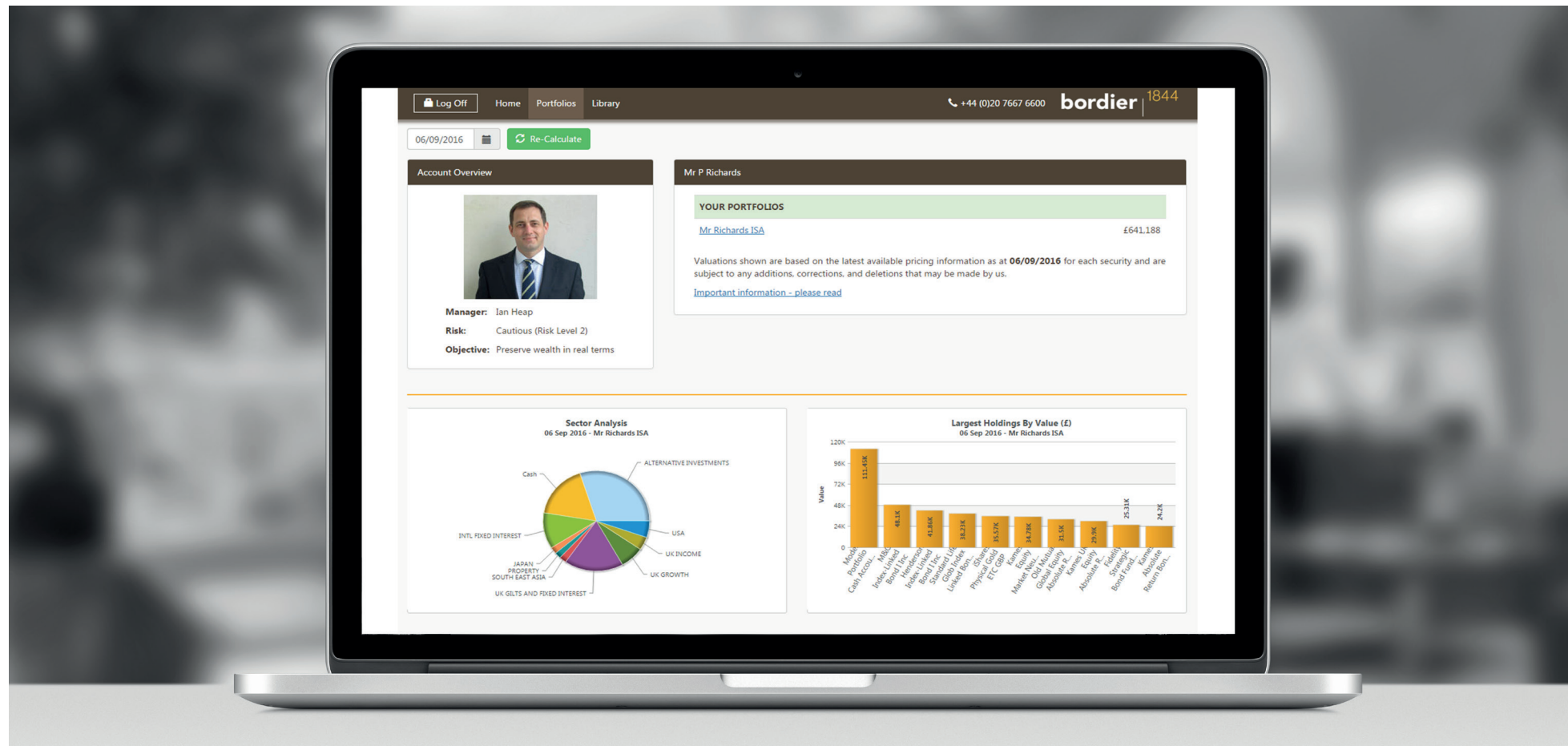
Home page

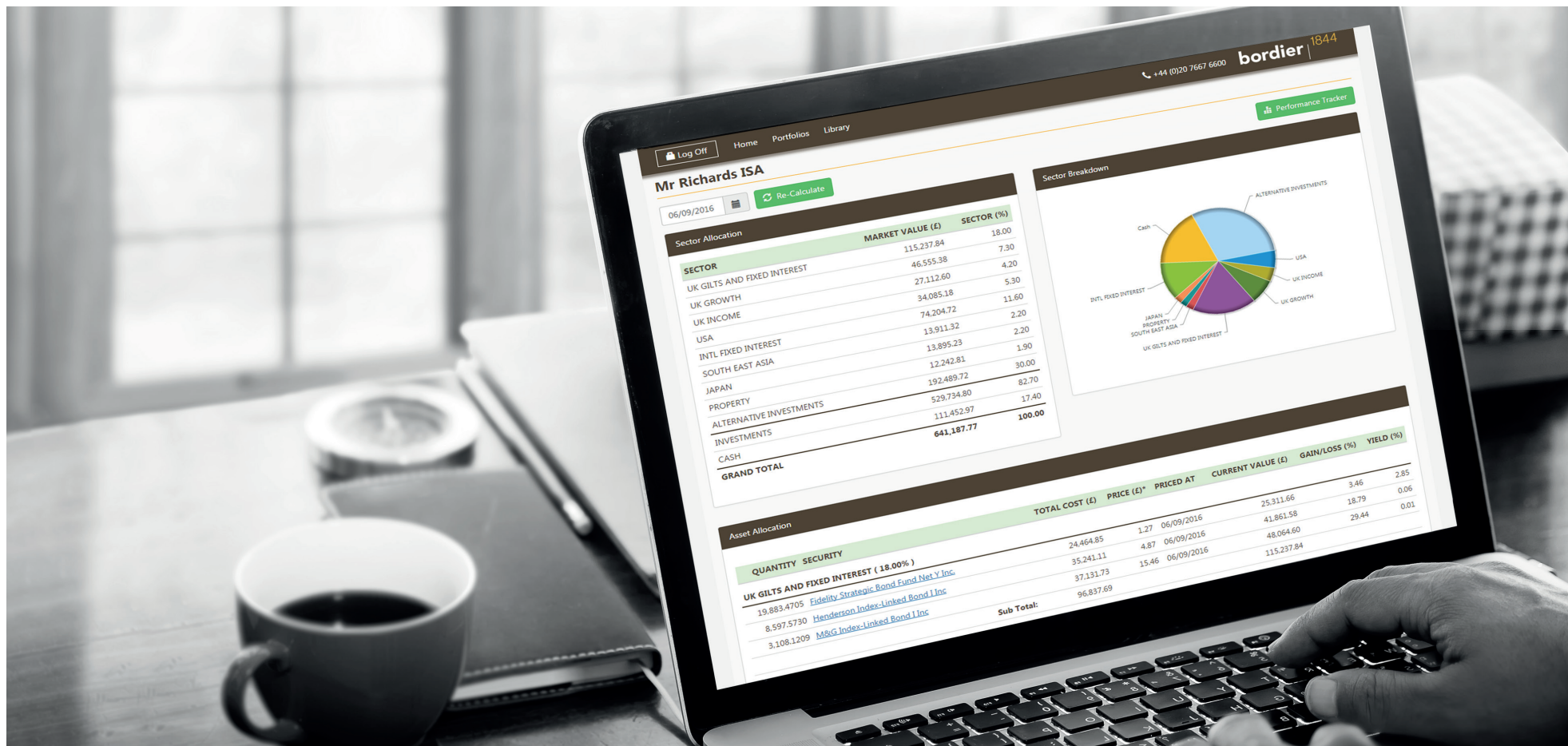
The Home page displays a list of your portfolios and a graphical analysis of investments by sector and holding.

The page also includes a pie chart showing the sectors you are invested in and a bar chart that shows a breakdown of your largest holdings by value. If you have more than one portfolio you can also select which one of them you wish to view.

Clicking a portfolio name will take you to the Portfolio page with a more detailed breakdown of your investments.

 To see the value of your investments on any previous date simply select a date from the menu at the top of the page then click Re-Calculate.





Portfolio page

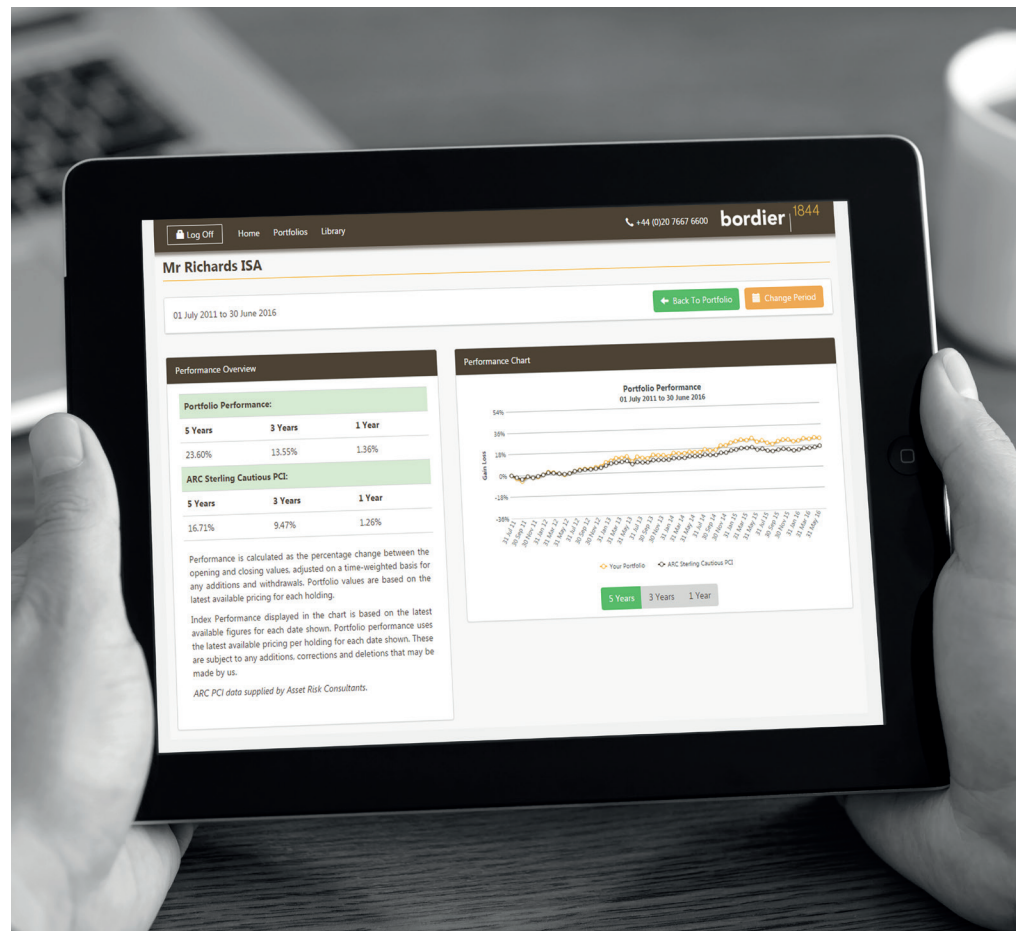
This page shows the details of the individual assets held within your portfolio. To view historical information simply select a date from the menu at the top of the page then click Re-Calculate.



Clicking on an individual holding will display the complete transaction history including details of all purchases and sales.



Cash statements are also available for each account. These will initially cover the last three months but this can be changed using the Select Period button.



Performance Tracker page

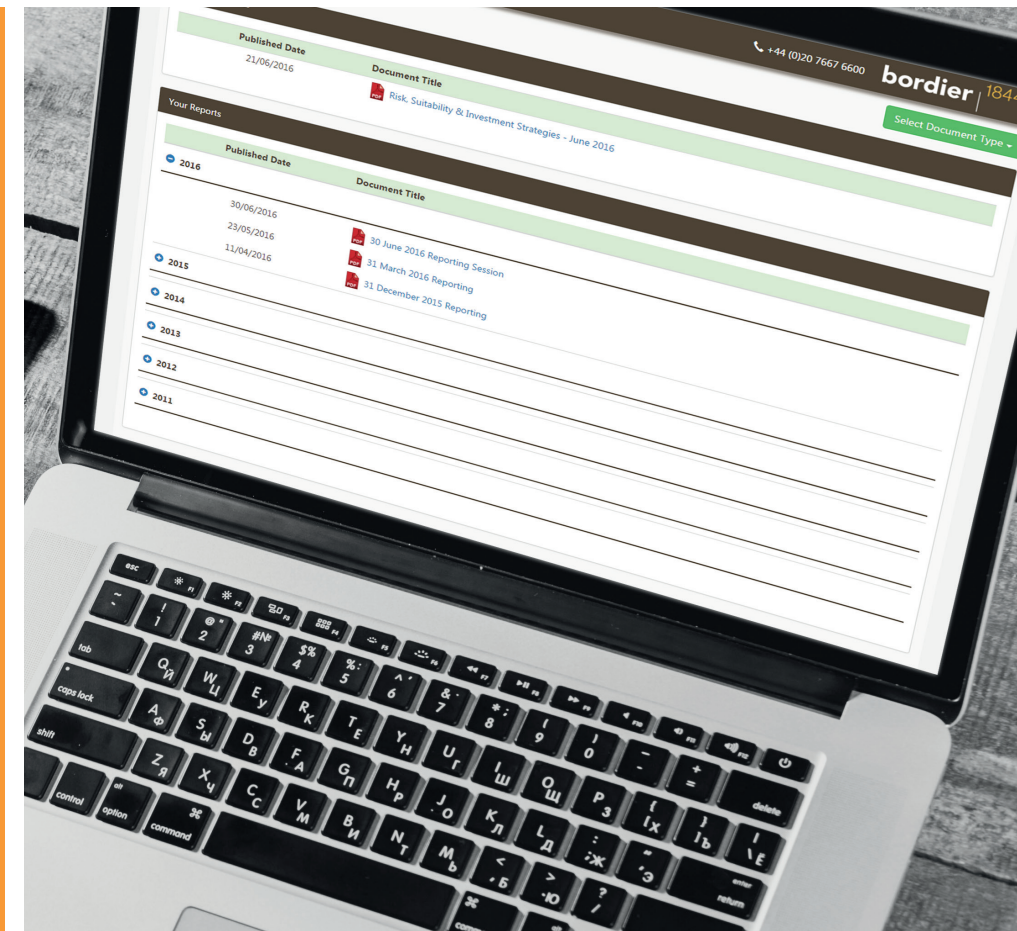
Where a portfolio has sufficient history, Performance Tracker provides the ability to view its performance against a relevant benchmark over time. Performance is shown over 1, 3 and 5 years (where applicable).

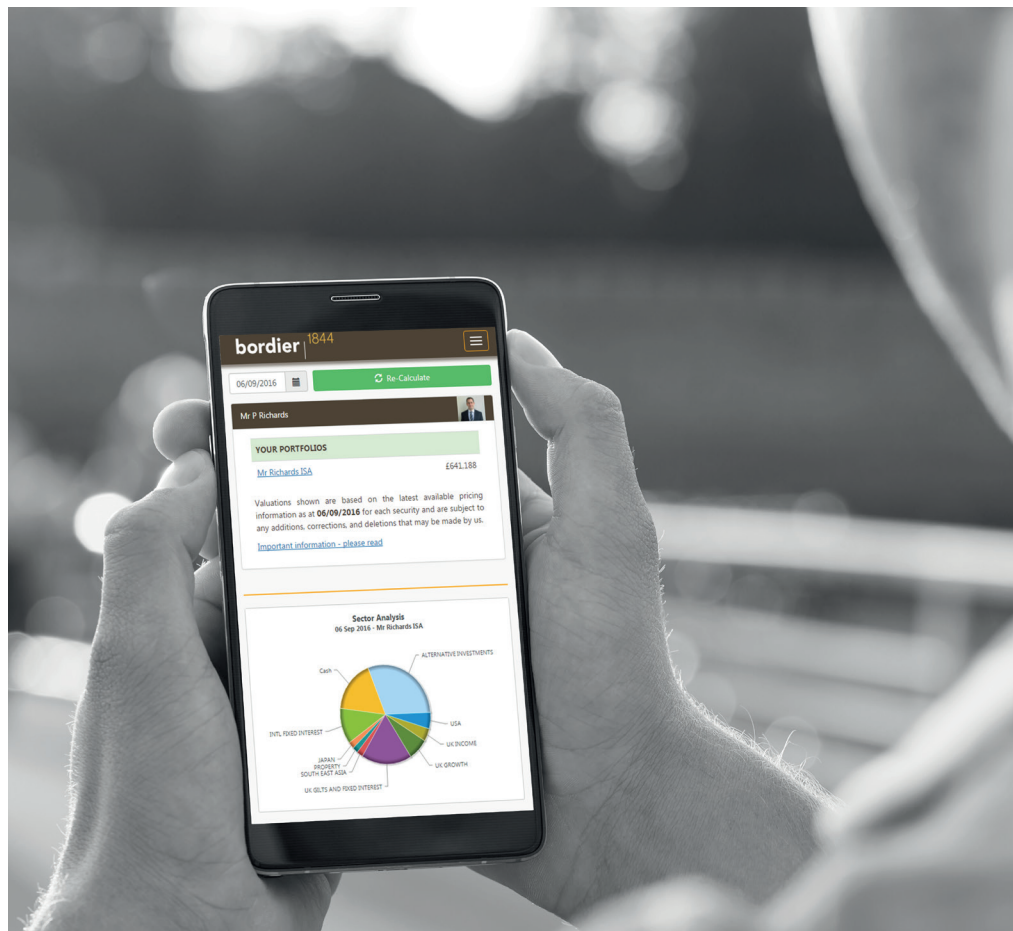
💡 You may use the Change Period button to view performance over different timeframes. There are quick links for 6, 12 and 36 months, as well as options to select a range of quarters.

Document library

The document library can be accessed from the "Library" option at the top of every page and contains all your historic valuations and tax reports.

You can download, view and print documents at any time. An email notification will be sent when a new document is made available in your library.





Mobile devices

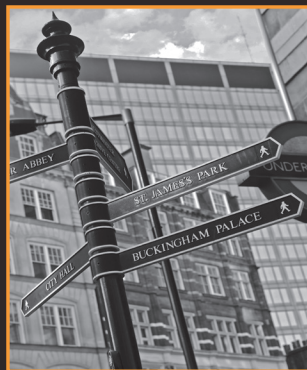
The Bordier UK secure client web portal is optimised for mobile and touchscreen usage and works with all Android and Apple devices including the iPhone and iPad. The site will also adapt so that information displays clearly on smaller handsets.

Questions

If you have any questions about the Bordier UK secure client web portal, please contact our client services team:

Telephone:
020 7667 6600

Email:
client.services@bordieruk.com



Contact us

For further information please visit our website at:
www.bordieruk.com

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