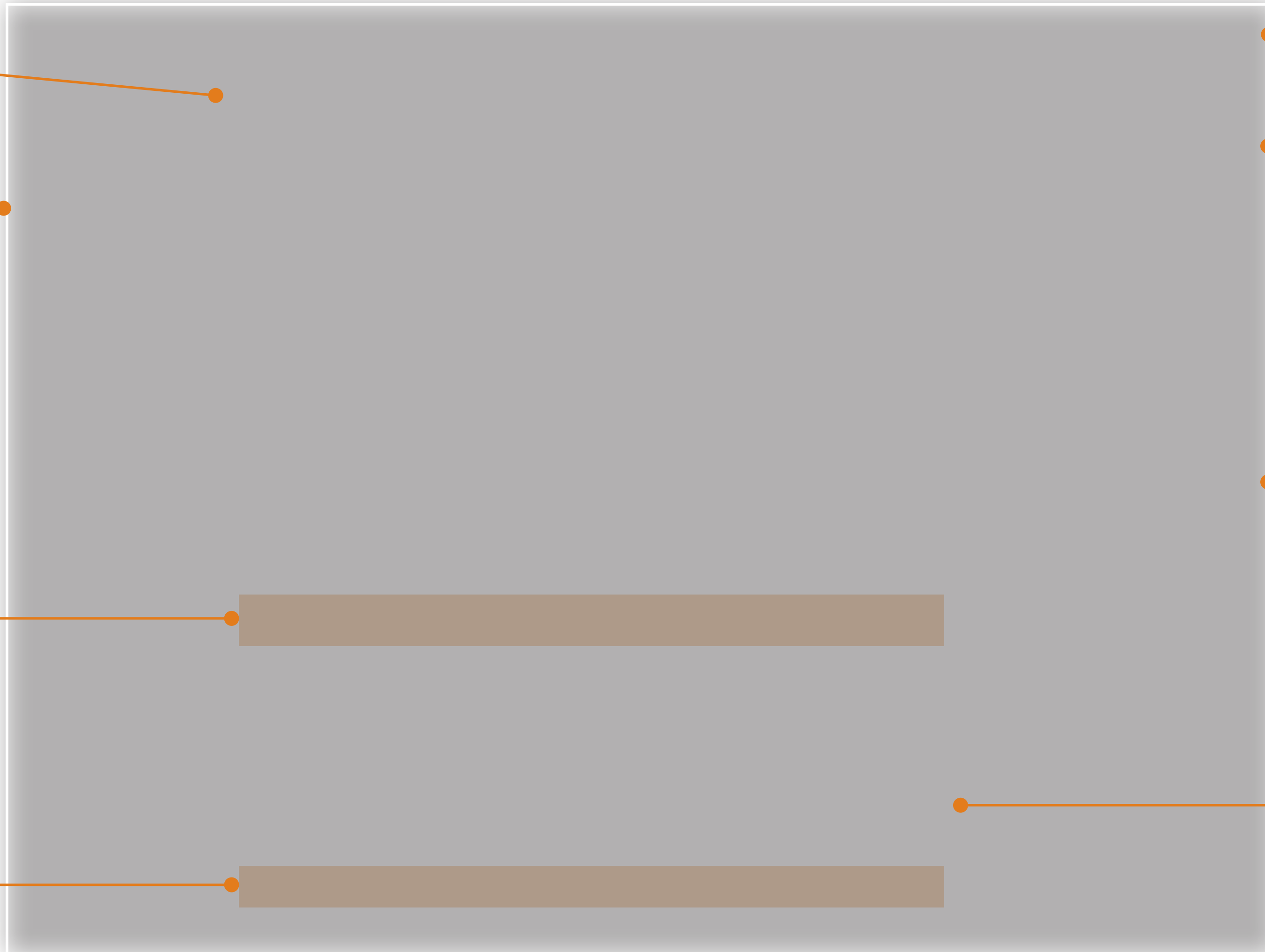
Bridgehouse iFast Web PLUS: Quick Reference Card

iFast Web PLUS

Secure online access to key fund, advisor and account data.

Navigating the Advisor View

Use the 5 modules to access account and asset details, transactions, compensation information, "block of business" reporting and more.



View the advisor name and representative code

The navigation pane highlights your current view (Account, Advisor or Fund)

Sort tables in ascending or descending order by clicking on the column name

Filters allow you to easily narrow your data

Sign off, change the language or change your password

View contact information for the representative code

Generate "block of business" reports with just a few clicks

- View module-specific details
- Download a CSV file
- Print a formatted PDF file
- Collapse the module
- Expand the module to show more details

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Navigating the Account View

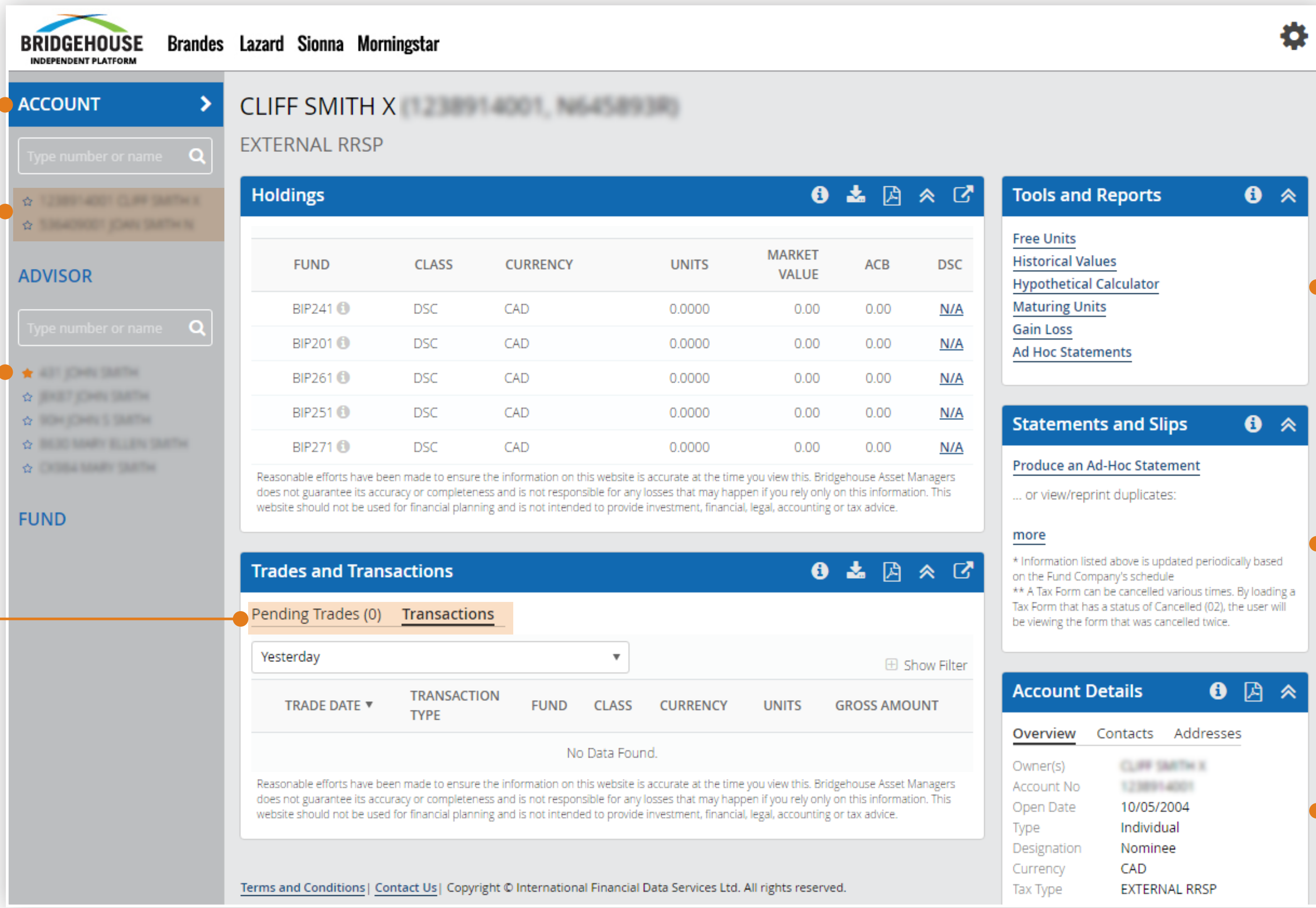
Access information such as: holdings, pending and posted transactions, details on the account holder(s) or advisor and more. Be better prepared to serve your clients with access to key reports, statements and tax slips using self-service tools and reducing time spent on administration.

Search by number or name

View recently searched results

View and remember favourites

Toggle between tabs



Inquire on free units, view historical values, perform a hypothetical redemption calculation, view the maturity schedule for units subject to a back-end load (DSC) fee, view capital gains and losses, or create ad hoc statements

Access statements and tax slips with just a few clicks

View contact details for all parties on an account

Note:
Many functionality options are available throughout the site on multiple modules

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