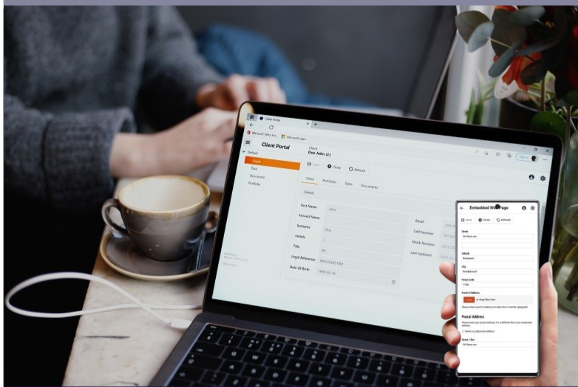

TEESSEN CONSULTING

Client Portal……for the Client

The Client Portal is designed to act as a direct and open channel between Client and Financial Advisor / Brokerage.

Your Client will be able to access the Client Portal from any digital device using the secure login details as provided by you.

YOUR CLIENT HAS THE ABILITY TO:

- Access their personal details
- Get an overview of their personal insurance portfolio
- Monitor claims and queries
- View their stored documents on record
- Perform certain actions with the ability to attach supporting documents directly

THIS CHANNEL OF COMMUNICATION IS DETERMINED AND CONTROLLED BY THE FINANCIAL ADVISOR / BROKERAGE

Specific business rules and processes can be applied in the system to control how this interaction with the client is interpreted and actioned within your business.

FEATURES

- VIEW PERSONAL INFORMATION
- PERSONAL INSURANCE PORTFOLIO
- MONITOR QUERIES
- VIEW DOCUMENTS

ACTIONS

- CHANGE OF ADDRESS
- REQUEST A QUOTE
- REGISTER A CLAIM

CONTACT

- FOR MORE INFORMATION ON ANY OF OUR PRODUCTS OR SERVICES:
  - 27 (87) 550 1427
  - www.tconsult.co.za