

# ADVISER VALUATION SERVICE SECURE ONLINE ACCESS TO YOUR CLIENTS' VALUATIONS



# ADVISER VALUATION SERVICE

At Columbia Threadneedle Investments the success of our clients is our priority. By enhancing the service we provide advisers, we in turn help you strengthen the service to your clients.

Our online valuation service for advisers allows quick and easy secure access to your clients' investment valuations and transaction history at a time that suits you.

## Key features

- View/download/print your clients' current total assets
- View/download/print your clients' transaction history\*
- Client search function
- 24hr access

\*Please note transaction history is only available from April 2011.

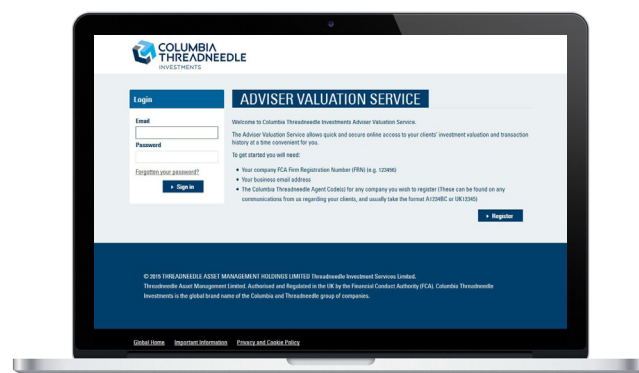
# CREATING YOUR ACCOUNT

Setting up your account is easy to do, just follow the simple steps below.

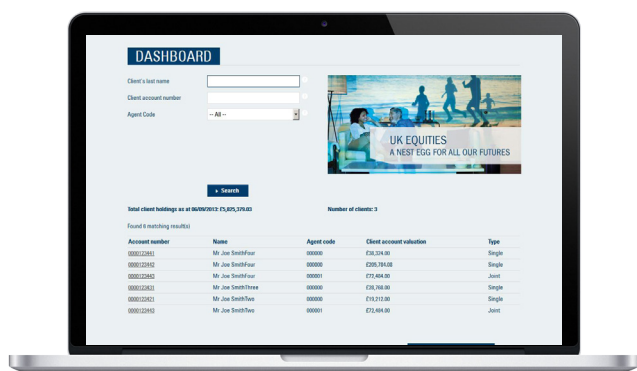
## What you need to get started

- Your company FCA Firm Registration Number (FRN) (e.g. 123456)
- Your business email address (e.g. your.name@yourcompanydomain.com)
- The Columbia Threadneedle Agent Code(s) for any company you wish to register (These can be found on any communications from us regarding your clients, and usually take the format A1234BC or UK12345)

**Step 1** Go to [columbiathreadneedle.co.uk/avs](http://columbiathreadneedle.co.uk/avs), click **Adviser Valuation Service** and select **Register**



**Step 2** Enter the **Agent Code(s)** for any companies you wish to register and your **FCA Firm Registration Number (FRN)**



**Step 3** Set up your account and request an activation code

You will be asked to fill in a few simple details and create a password for your account.

Your **Activation Code** will be sent to you by email **within seven working days**.

**Step 4** Activate account

- Upon receipt of your Activation Code, click the link in the email or return to **columbiathreadneedle.co.uk/avs**
- Login using the username and password you previously set up
- Enter your Activation Code, along with any one of the Agent Codes you registered on account set up

Your account will then be fully activated and you will be able to view your clients' valuations and transaction history.



## FRAUD PREVENTION

Your security is very important to us. We have a number of controls in place which are designed to protect our clients from fraud. These include information we will obtain from you when you register for the service, which will be used to identify you when you make transactions or change your details.

## FREQUENTLY ASKED QUESTIONS

We've set out answers to some of your frequently asked questions below.

- Q Once I have set up my account, can I add further Agent Codes?**  
Yes – simply call our client service team on 0800 953 0134\* to register further Agent Codes.
- Q Do my clients have access to this service?**  
No, they cannot access this tool, however, we do offer a similar service, myThreadneedle, to investors. They may or may not have registered to use this service. If you would like your clients to have access to this please ask them to call our client service team on 0800 953 0134\*.
- Q Can I transact using this service?**  
No. This service does not support transactions.
- Q What is an Agent Code and where can I find it?**  
An Agent Code is the unique reference Columbia Threadneedle has issued to your company to use when you transact on behalf of your clients. You can find this on any of the correspondence we have sent you regarding your clients.
- Q Do I have to use my Activation Code every time I login?**  
No, once your account has been activated you will only need to use your email address and the password you created when you registered.
- Q Is the site secure?**  
Yes. When you create your account we will ask you to set a password which you will need in order to login.

\*Please note calls may be recorded. The client service team are available to take calls from 8am to 6pm (UK time), Monday to Friday.

To find out more visit  
**COLUMBIATHREADNEEDLE.CO.UK/AVS**

## FURTHER INFORMATION

If you have any questions about the service or setting up your account, please contact us on **0800 953 0134\*** or visit **columbiathreadneedle.co.uk/AVS**

\*Calls may be recorded

