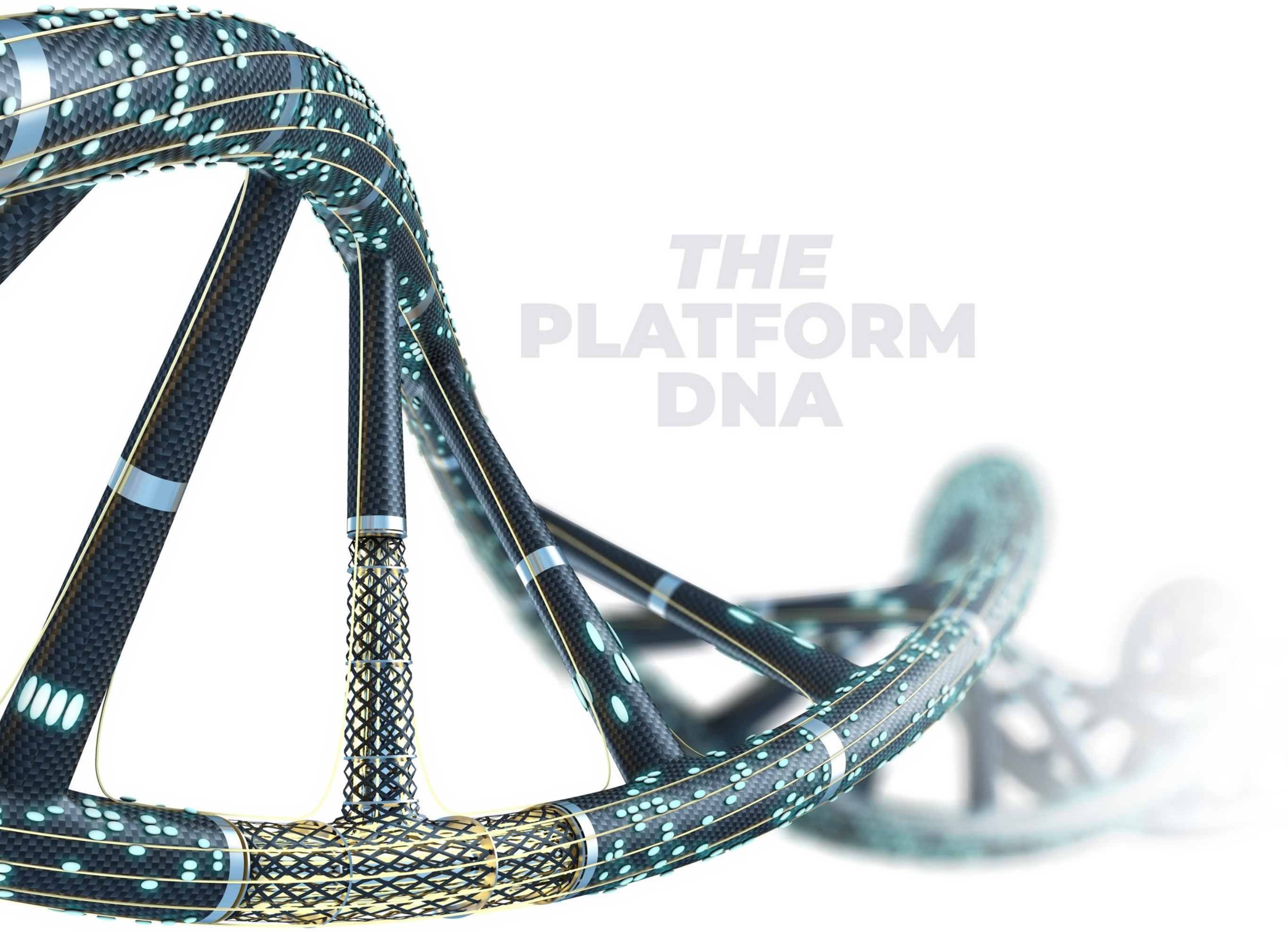
Telephone: 0330 123 9830
investing@tavistockplatform.com

tavistock
THE PLATFORM.



VALUATIONS AND REPORTS

Guidance and Checklist

Overview

The platform allows for various reports to be generated depending on the nature of data needed. The reports are Valuations, Monthly Statements, Waterfall Report, Quarterly Report and Annual Charges

Audience

This document is intended for **Advisers** and **Account Providers** and **Support Staff**, including those with the **Client Manager** role.

Requirements

Valuations and Reports can be generated and accessed on own behalf or on behalf of the client by:

- Appointed **Adviser** of the client; or
- Someone with the **Account Trustee** role of the Account Provider

Steps

1. Select client and navigate to the required account page.
2. Navigate to **Reports** and select chosen report/valuation.
3. Follow onscreen instructions and select **Download as PDF**.
4. **Downloads** section has blank documents available to download if required.

Contact Us

If you would like to learn more, please get in touch.

Call us on 0330 123 9830

Lines are open 8.30am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at investing@tavistockplatform.com

We aim to provide an initial response to your query on the same working day.

Address

Peartree Business Centre, Cobham Road, Wimborne, Dorset, BH21 7PT