

# Make an additional offshore investment in just a few clicks

At Glacier International we are committed to ensuring that doing business with us is effortless. We want to ensure that, as an intermediary, you get to spend more time building relationships with your clients than attending to administration. That means that we are constantly improving and streamlining our processes, and introducing technology and features that allow you to execute tasks quickly and efficiently. The **Glacier International Additional Offshore Investment** feature helps to achieve exactly that, through automating a previously manual and administration-intensive additional investment process.

## What to know about the Glacier International Additional Offshore Investment feature

- **Everything can happen online.** There really is no need for paper processing. Our world has moved into the digital realm and continues to do so, at an incredible pace every day. The **Online Additional Offshore Investment** feature solves your clients' needs as well as some administrative challenges you may have experienced.
- Your clients must have **activated** their web accounts.
- Although we encourage digital transactions, the **manual processes** may still be used by those clients who prefer to do things manually.

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Quotes Reports Cases

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Plan Type Plan Holder Investment Setup Investments Quote Review Download

Would you like to do a Quote for a New Plan or Ad hoc into existing Plan?

New Plan
  Ad hoc into existing plan

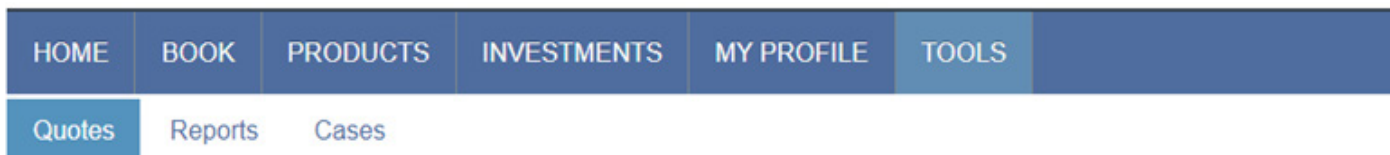
**Find Plan**

Search  Search Cancel

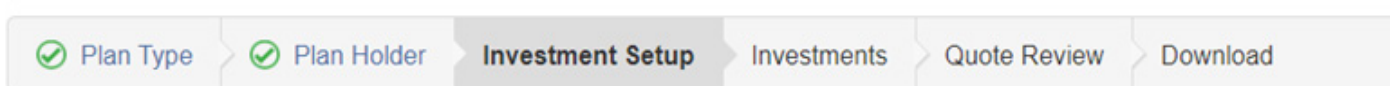
Name	Acct Num	Issue Date	Intermediary	Actions
1002009304 : Bread Etokan	1002009304	10-Aug-2018	Acklyod Lnm	<span style="background-color: #ccc; padding: 2px 5px;">Select</span>

- **The new process is efficient.** There is less administration with little to no paperwork, and it involves an end-to-end process of a few clicks within our system.
- **The process is simple and saves you time.** The new process frees up time for you to focus on other things. And it's even quicker when you use the following functionality:
  1. Load Previous SOW selections
  2. Previous Client Authorisation.

## The screenshots below illustrate the functionality and the steps to making an online ad hoc investment

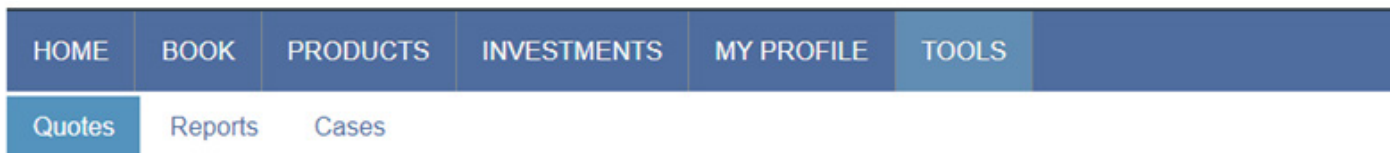


### Ad hoc Investment for Plan # 1002009304

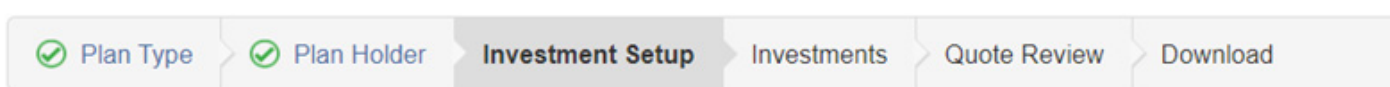


- Finalise your client's ad hoc investment - **from quote stage to the inception date** - within the same platform, seamlessly.

### Quote Screen

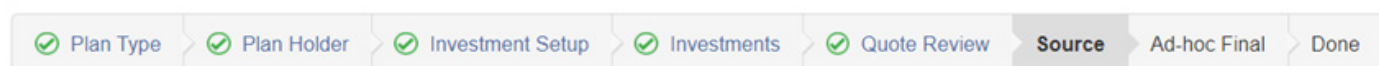


### Ad hoc Investment for Plan # 1002009304



### Application Screen

#### Ad hoc Investment for Plan # 1002009304



#### Source Of Wealth ⓘ



- **Get an improved customer experience** and transparency as your clients can review their quotes to make an informed decision.

## Ad hoc Investment for Plan # 1002009304

Progress bar with steps: Plan Type (checked), Plan Holder (checked), Investment Setup (checked), Investments (checked), Quote Review (checked), and Download (highlighted).

### Download Quote

Buttons for actions: Download PDF, Email PDF, Return to List, View, and Edit.

- **Experience improved security** through two-factor authentication. Your client must have activated their web account. Authentication will happen via the registered contact details on IMS.

### Authenticate first before signing

We will send a text message (SMS) with a code to the mobile phone number ending in **9603**

Send text message button with a speech bubble icon.

Pending for Advisor signature

Previous button

- **The Quote Repository** allows you to keep the quote in draft mode until reviewed and approved by your client.

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Quotes	Reports	Cases				
<b>Quotes</b> <span>Start New Quote</span>						
Id	Date	Prepared for	Presented By	Description	Quote	Application
78303	10-Mar-2024	Bread Etokan	Acklyod Lnm (745596)	Global Life Plan Top-up into plan #1002009304		
78302	10-Mar-2024	Bread Etokan	Acklyod Lnm (745596)	Global Life Plan Top-up into plan #1002009304		
78301	10-Mar-2024	Bread Etokan	Acklyod Lnm (745596)	Global Life Plan Top-up into plan #1002009304		
78300	09-Mar-2024	Bread Etokan	Acklyod Lnm (745596)	Global Life Plan Top-up into plan #1002009304		
78297	09-Mar-2024	Diana Voxen	Acklyod Lnm (745596)	Global Life Plan Top-up into plan #1002083853		

## A step closer to simple offshore investing

The Glacier International Online Offshore Additional Investment feature is available on the Glacier International Investment Platform. While the manual quotation and application methods will continue to work as normal, the adoption of the online process brings you a step closer to investing offshore simply and efficiently.

To find out more about the **Glacier International Online Additional Investment** feature, reach out to your Glacier International **business development manager**.

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