EFCIS Portfolio Manager

What is Portfolio Manager?

Portfolio Manager is an on line interactive application developed independently by **EFCIS Limited** which assist both clients and EFCIS Limited as the broker to ensure ongoing policy compliance as well as access to key policy documentation. Both parties can communicate on line and validate their understanding of fundamental compliance facts at any stage. It also ensures that the advise provided and the manner in which our clients are service is consistent and in line with in-house procedures (best practice).

What information can I access on line?

1. Latest and historic policy documents and full terms and conditions
2. Notification and claim key documents and status
3. Guides to credit insurance and policy compliance
4. Access to specific underwriters, news and other useful business websites
5. Policy compliance check lists
6. FSA related policy documentation/requirements
7. General correspondence and supporting documentation, as required by each individual policy

How does it benefit me?

1. Audit trail
2. Instant activity stream which is viewable by client and key account manager
3. Instant messaging direct with key account manager
4. One site for all documents/contacts/web addresses/underwriter info
5. Financier access for ease of administration
6. Monitor broker performance
7. Easy access - Web based – can access via a Blackberry, or PDA if required

How does the Portfolio Manager help with policy compliance?

In addition to on-line guides to policy compliance each client can check the level understanding by clicking on compliance checklists. The compliance checklists will ask a series of key compliance facts and asks for Verification of understanding. Your EFCIS key account manager can also view any key compliance understood. This will prompt additional training/clarification requirements.

Can the Financier have access to my account?

In order to give comfort to a financier, a finance level has been developed within Portfolio Manager.
The financier can access information such as policy documents, assignment confirmation, limit schedules and general policy information. Given that the financier has access to up to date policy and limit information they can increasingly become comfortable with the risk, which may positively impact upon levels of funding.

How much does it cost?

There is no charge for access to Portfolio Manager for current insured clients of EFCIS Limited.

EFCIS Limited, Registered in England 3497611, 7 French's Yard, Amwell End, Ware, Herts, SG12 9HP
Tele: 01920 464440, Facsimile 01920 464123,