

28 October 2013

Major revamp of Cofunds website

Cofunds, the leading general investment platform in the UK today announces that extensive user-influenced enhancements to the Cofunds website, the engine behind the platform, are now live.

The latest change is based on significant input from users across the spectrum (administrators, paraplanners, advisers and principals - small firms and large). It will simplify how users access their client's details, bringing together all of the relevant account and product information into one intuitive area called My Client Dashboard.

With fewer steps required, My Client Dashboard makes it easy to access all of the tools and trading options advisers need to service their clients

The key benefits are:

- **All in one place**
Bringing together all client information, enabling clients to be serviced from one central place
- **Simple & clear**
With fewer steps and screens to navigate, My Client Dashboard makes accessing tools and services easy. When selecting a client, My Client Dashboard will automatically launch
- **Making advice easier**
Access to client's investment information - including detailed valuations, a full transaction history, portfolio x-ray and correspondence - at the click of a button from the Client Overview page
- **More intuitive**
Everything users need, where they expect to find it - without changing any of the online processes they're used to

Cofunds Head of Marketing Stephen Wynne-Jones said: "The Cofunds website is at the heart of our proposition - it's not just a promotion tool, it's the means by which our clients research, plan, analyse, manage and trade. So after extensive input from



across our user base we've been working on improving the usability of the site. My Client Dashboard is a great example of co-creation at work.”

Harry Katz, Principal of Norwest Consulting and long-standing Cofunds user commented: “I don't always agree with what Cofunds does, but I've seen the improvement to the website and think this is really very good for intuitive usability, the tools and all the reporting functions.”

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For further information please call:

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About Cofunds

Cofunds is the leading general investment platform for advisers and other financial institutions, with assets under administration of £53.7bn*. It provides flexible administration and management services for advisers and their clients as well as dealing and custody services for financial institutions. It does not offer investment management or advice, nor does it compete with advisers by offering its services direct to the end client. Cofunds exists to serve the needs of institutions, advisers, their clients, and fund managers. Cofunds is wholly owned by Legal & General and authorised and regulated by the Financial Conduct Authority.

*Source: Fundscape (as at 30/06/13)