Checklist

To ensure we can provide you with the best client experience, please provide the following:

Checklist

Company logo

For use on your branded monthly and quarterly portfolio reports

☐

Portfolio name

The name you would like to refer to your portfolios

☐

Company colours

For use on your branded monthly and quarterly portfolio reports

☐

Quarterly portfolio report content

Advise if there are any tables or graphs you would like to omit

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Xplan feeds

Advise us of your Xplan URL and we can establish direct feeds for Zenith reports

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