

How to print your documents

Step 1 – Log in to the portal

Click [here](#) to visit our broker portal.

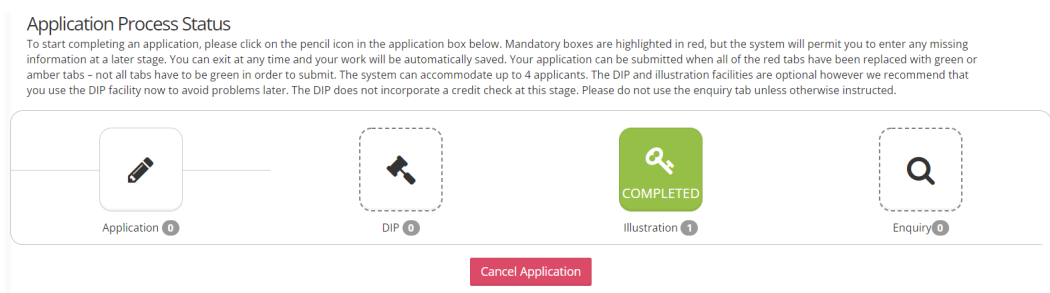
Enter your username and password to log in, your username will be your email address.

Step 2 – Locating client

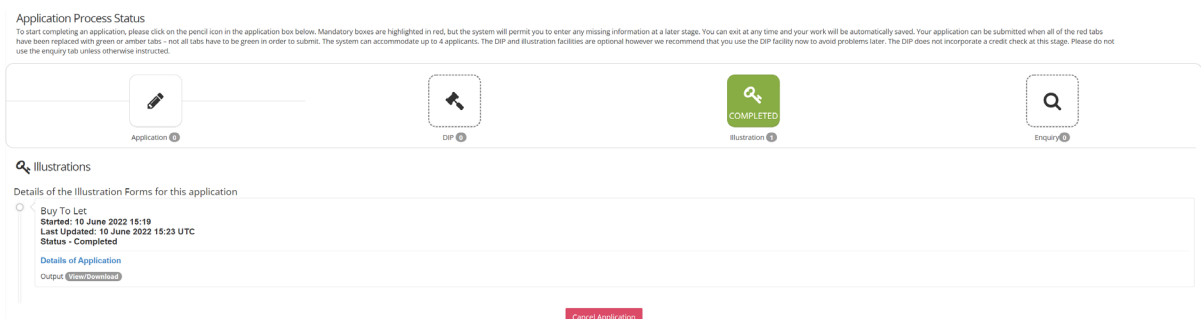
Once logged in you will be presented with a list of your existing clients. Select the **name** of the client you are trying to access the documentation for.

Step 3 – Printing documentation

When you have selected the client, you will go through to the client page where you will be presented with the below screen, for each document you have completed the box will appear green.



Click on the box *once* of the document you wish to print, and a drop down will appear which appears as below;



You will be presented with the options to 'View/Download' the document, this will allow you to download a copy and print it for your files.