

# REGIS BENTLEY

WEALTH MANAGEMENT

WealthOptimiser



Secure, Tracked & Organised

powered by  moneyinfo

**A clear, uncomplicated view of your finances in one place. Your investments, savings, pensions, insurances, bank accounts, credit cards, store cards, mortgages, loans and property alongside all the associated paperwork.**

On your desktop and as an app on your tablet and smart phone, your finances are beautifully brought together under a single login accessible to you at any time, wherever you are.



## With **WealthOptimiser** you can



**View your investment portfolio**



**Quickly access your insurance details**



**Track your property values**



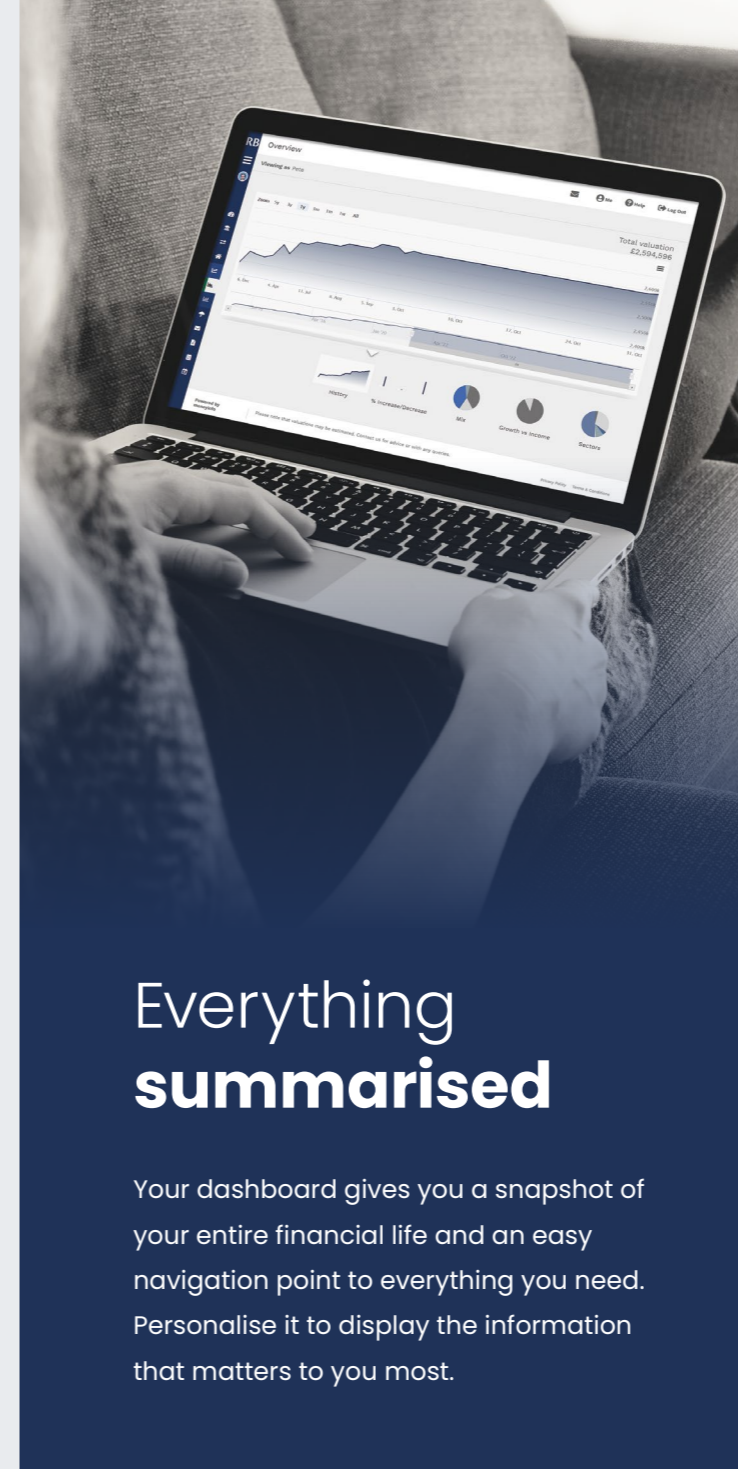
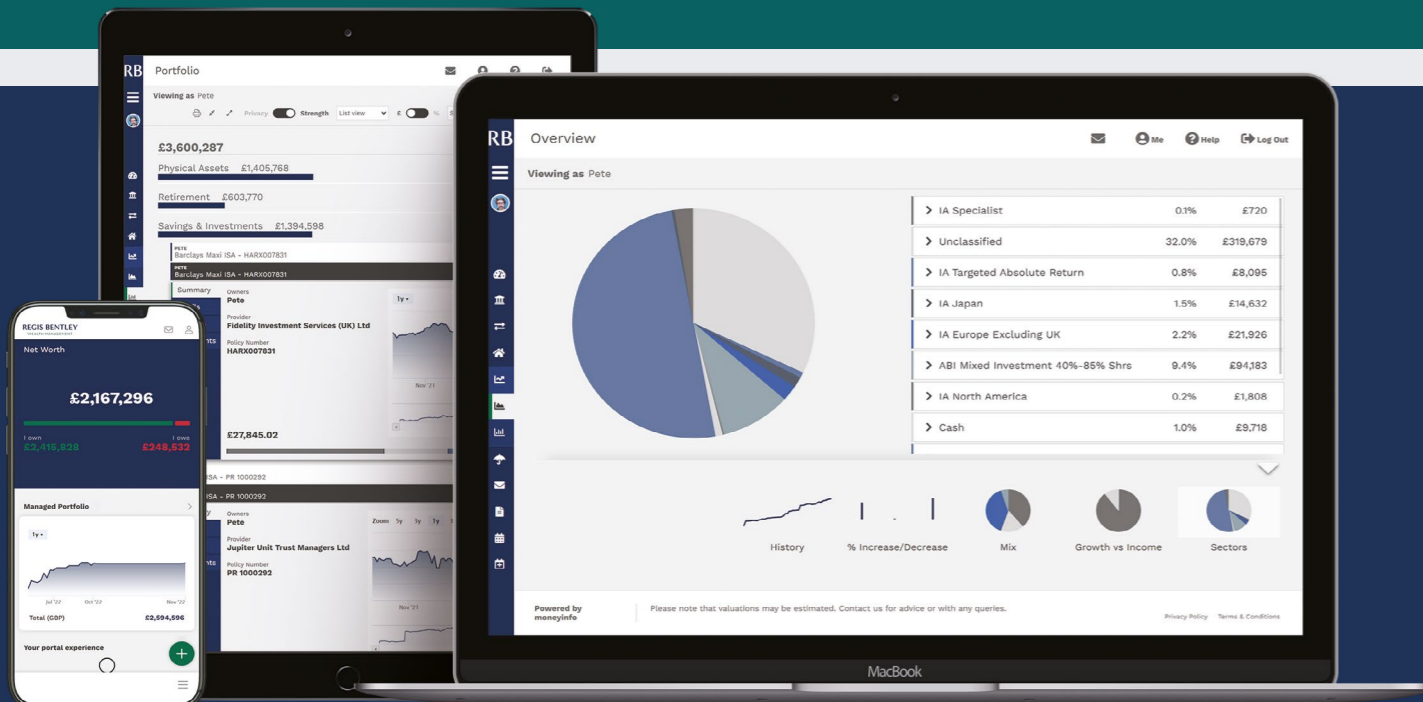
**Manage your income and spending**



**Safely store all your important documents**

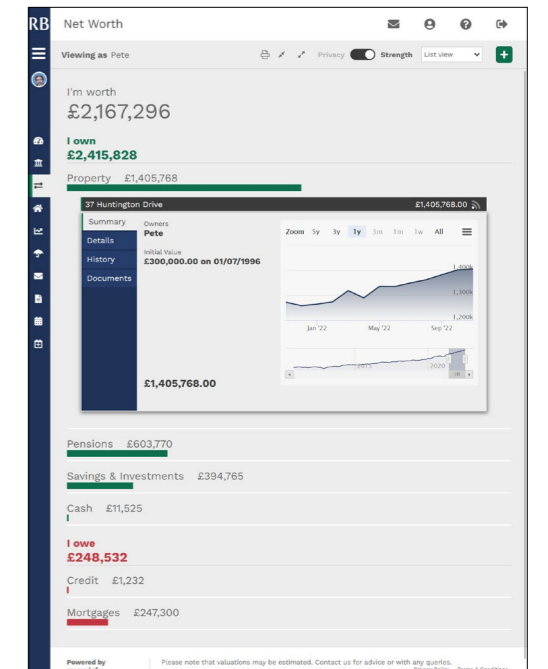


**Be reminded about your renewals, income and payments**



## Keep track of your investments

**WealthOptimiser** makes it easy to see how your investments are doing. Valuations are updated daily and build into a history across your entire portfolio.

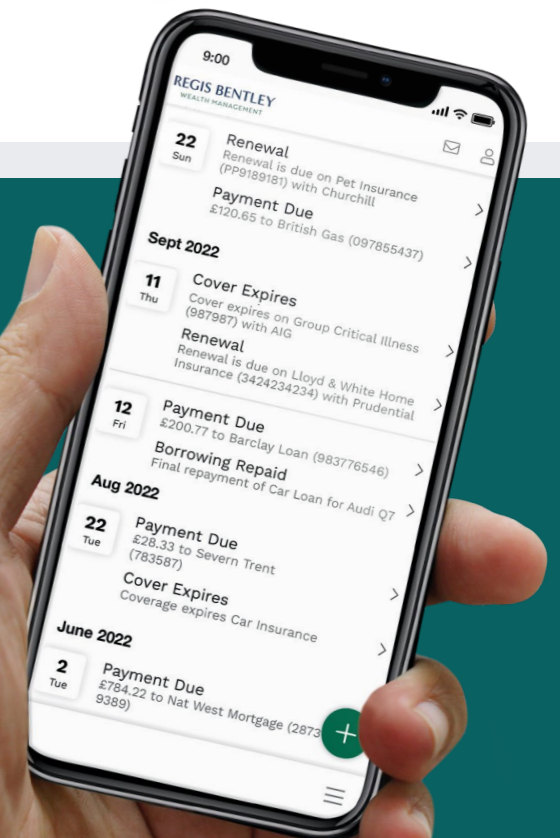


## Everything summarised

Your dashboard gives you a snapshot of your entire financial life and an easy navigation point to everything you need. Personalise it to display the information that matters to you most.

## Your personal financial assistant

Keep an eye on upcoming renewals, payments, income and maturities. Add your own key events such as MOTs, road tax and HMRC payments.



## Keep your important documents safe



Store all your paperwork including wills, property deeds, insurance contracts, policy documents, valuations and statements. **WealthOptimiser** keeps your important financial documents safe, secure and accessible.

Your Regis Bentley Wealth Management adviser can share documents and reports with you so you can read them when it's convenient. Simply log in to **WealthOptimiser** from any device and your important financial documents will be there waiting for you.

## A true picture of your net worth

**WealthOptimiser** tracks the value of your assets and liabilities over time. For you, your partner, your dependants, your trusts, your companies: all brought together into a single view.



## See where your money goes

Access your bank accounts, credit cards and store cards together under one secure login. **WealthOptimiser** helps you keep track of your income and spending and see where your money is really going.

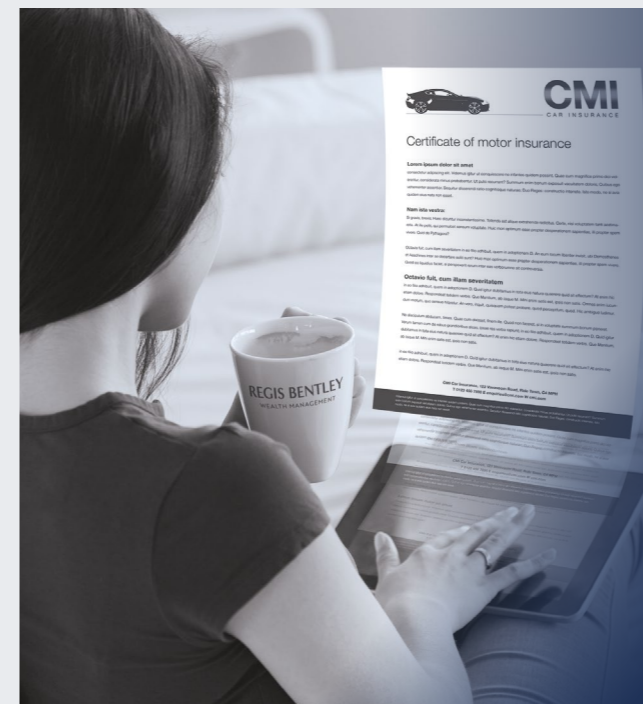


## Your property valued

Want to know what your home is worth? Enter your house number and postcode and **WealthOptimiser** will display your property details and track its value using Land Registry data.

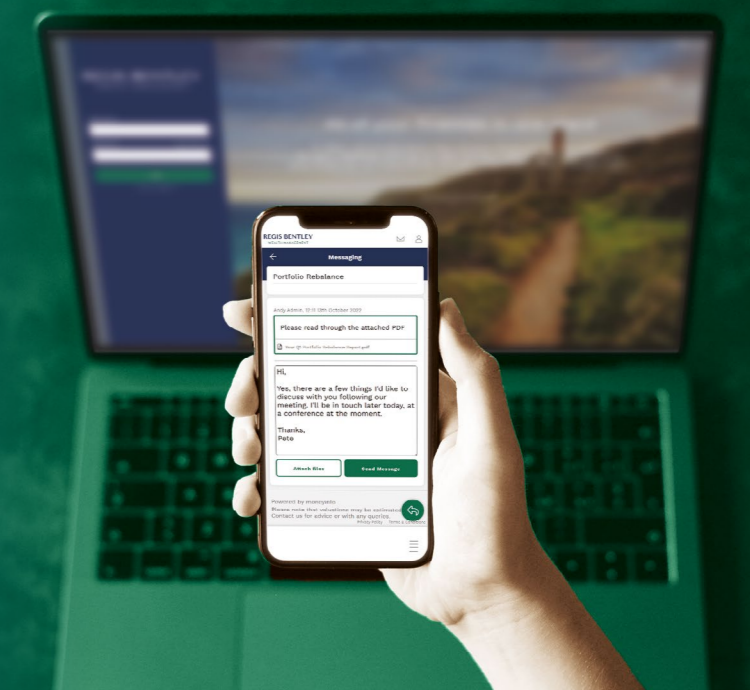
## Access your insurances when you need them

Your policy details are stored next to the things they relate to. Your home insurance next to your home, your car insurance next to your car. **WealthOptimiser** reassures you that in the event of an emergency you can access the information you need quickly and easily.



## Secure and timely communications

**WealthOptimiser** ensures that your personal data is exchanged using only the most secure methods. Notifications alert you when important messages or documents are waiting to be read.



## Enhanced privacy controls

Our privacy controls allow you to decide who your information is shared with, for example your partner or your adviser. Set your privacy defaults when you first log in and easily change this for individual financial items you add to your account. **WealthOptimiser** ensures that you are always in control of your data.



## Your data is always protected

We take the security of your personal and financial information very seriously and **WealthOptimiser** makes sure that your data is safeguarded using bank level security and encryption. Our mobile app is further protected with your own six-digit pin and registered to your personal device.



## And finally, for your peace of mind

If an emergency situation arises, where will the important details about your assets, liabilities, property and insurances be found?

**WealthOptimiser** brings all this information together in one place with all the associated paperwork, making it accessible should it be needed.

## REGIS BENTLEY WEALTH MANAGEMENT

### Putting you in control of your finances

- Your personal digital filing cabinet with all your finances organised and updated.
- It's financial peace of mind in your pocket, knowing that your most valuable records are safe and accessible.
- No need to log on to multiple financial sites, helping to reduce the risk of online fraud.
- Keep all of your financial records together and easily track your income and expenditure.
- Access your information when you need it from any device.



[Find out more](#)

# Testimonials

"For the first time I can see what I'm worth. I can see my home going up in value, as well as what my savings are doing. I feel in control, and I feel more confident making important financial decisions."

"Now I only have to remember one login to access all of my important financial accounts and documents."

"WealthOptimiser provides me with a helicopter view of all my finances and the detail when I need it. I love it."

"It's great being able to see all of my recent transactions in one place rather than logging into several different websites."

Access your online portal today  
[regisbentley.moneyinfo.co.uk](https://regisbentley.moneyinfo.co.uk)

**Call** 02380 171 070

**Email** [info@regisbentley.com](mailto:info@regisbentley.com)

**Visit** [regisbentley.com](https://regisbentley.com)

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