

Client Terminal Access Programme

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TIER	REPORTING	ENQUIRIES
Terminal	A daily position file, a weekly document digest and a quarte	privateclients@iguako.tech

The programme

The Client Terminal Access Programme provisions the reporting system used by clients of the institution. The Terminal holds positions, valuations, documents and mandate correspondence for one relationship. It is issued on invitation by the relationship team and is not reachable from the public site.

Access is a controlled thing and is treated as one. Every credential is issued to a named individual, every session is logged, and every document carries the date it was published. Access is reviewed each quarter and lapses if the client does not confirm it.

What is included

- A daily position and valuation file for every mandate held within the relationship.
- A weekly digest of the documents published by the institution that touch the mandate.
- The complete document set for the relationship, versioned and dated, including every report issued since inception.
- Credentials issued to named individuals, with a written record of who holds access to what.
- A quarterly access review in which the client confirms or withdraws each named individual.
- The right to require a human decision on anything the Terminal reports, under the seventh principle of the Ethical Technology Charter.

Eligibility

Access is provisioned for clients of record holding a Private Client Programme mandate or an institutional mandate. It is issued by the relationship team on invitation. The institution accepts no access request submitted through the public site.

Reporting

A daily position file, a weekly document digest and a quarterly access review, with every document versioned and dated on publication.

Colophon

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