Rooms

Communicate, collaborate, consolidate.
Bring it all together in one digital solution in Rooms.

Whether your financial professional is assisting you with applying for a home or car loan, completing an insurance or investment review, completing a tax return or simply getting your Will updated, Rooms is a great place to collaborate all the information you need to see it through to the end.

Efficiently upload, store and sign documents

Rooms is an all-in-one place for you to store your requested documents. Receive, view and sign documents in your portal instantly and effectively.

Automate reminders and assign to-do’s

Ditch the email back and forth and always be on the same page as your financial professional with tailored automated reminders.

Easily send & receive information using Digital Forms

Fill in questionnaires or templates to streamline jobs such as tax returns and fact finds.
Securely store your data in pre-filled Digital Formsallowing you to quickly review and add in any missing information.

Everything in one place

Find, complete and share all relevant Documents, questionnaires, To-Do's and communicate in one Room with your financial professional.

Invite relevant professionals to collaborate

You and your financial professional can add other stakeholders to a Room for easy collaboration to help you achieve success.

Chat instantly

Ditch long email threads and stay up to date on the progress of your financial tasks with instant messaging all in the one Room. Get notified the moment your financial professional sends a message.