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| **Procedure Name:**  | **DST Vision** |  |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** |  Katie Weinschenk |

**Description**

DST Vision is a website that aggregates many direct mutual fund and annuity company client information in one place for each advisor.

**Assumptions**

N/A

**Procedure**

1. To access DST Vision, you will log in under the representatives ID and Password
2. This is a good tool to review direct client accounts, statements, bank information, beneficiary designations, distribution & contribution information, et cetera
3. Daily Check
	1. From the home screen, click on the Client tab
	2. If you are the first person to access the Client tab for the day, you will see a list of the previous day’s transactions
	3. If the recent transaction list does not automatically populate, you can click on the Recent Transactions tab



* 1. This is a good tool for reviewing expected (or unexpected) transactions related to a follow-up task
1. Adding Rep Code Access
	1. Click Administrative in the right-hand corner



* 1. Select Add/Update Access
	2. Review the current fund company and rep codes DST can access
	3. Click Continue
	4. On the following screen, search for the fund companies you wish to add access to



* + 1. You will need one client account number under the rep ID you wish to add
		2. Continue to add fund companies and rep ID numbers until you are finished
		3. Click Continue
	1. An email will be sent to the rep when access has been added or denied

**References**

N/A

**Revision History**

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| --- | --- | --- |
| **Revision Date** | **Revised By** | **Revision Notes** |
| 11/14/2022 | Katie Weinschenk | Procedure Created |
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