



CLEARPOINT CLIENT PORTAL

24/7 secure online access to individual contract details, including payment history information, account balances, and more. Distributions can be submitted electronically using the secure upload feature through the client portal.



VoIP – INTERNET PHONE SYSTEM

Allows our team to work from anywhere with internet access so you speak live with one of our team members and experience seamless/uninterrupted customer service.



NEW CONTRACTS AND PAYMENTS

During this crisis a few staff members are reporting to the office. USPS, UPS, and FedEx deliveries are still being processed daily; however, we offer electronic solutions which eliminates the need for physical mail.

- Distributions sent to you via ACH/direct deposit
- Consumer funds collected via ACH rather than coupon books
- Fillable preneed contract forms - that can be signed electronically by your customer (some setup required)
- Submit new business to us through a secure site

Security and privacy continue to be our utmost concerns. Our business utilizes a secure remote desktop so that no matter where our team is accessing your data, rest assured it is safe and secure.

If you are not using these solutions, or the ClearPoint Client Portal today, please contact your Trust Administrator at **1-800-763-0234** to get started.