

FOR FUND PARTNERS

The Table — a walkthrough

Portfolio oversight with consent. What you see, what you do not, and who decides.

overview

/portfolio — Oversight of the companies you back: lives, premium where shared, claim ratio, renewals needing attention. Financial detail appears only where a company has turned sharing on, and stops when they turn it off.

companies

/portfolio/companies — Every company, with lives always and money where consented. Withheld is marked as withheld. A blank cell would read as missing data; 'withheld' is a decision somebody made.

alerts

/portfolio/alerts — What is worth a conversation — high claim ratios and renewals off track. Nothing is invented here. A quiet page can also mean a portfolio that has not turned sharing on.

settings

/portfolio/settings — What you can see, why, and what you will never see. The consent switch is not here and cannot be — it belongs to each company, on their own account.