STEPS TO CREATING A NEW CLIENT FOR TRUST & COMPANY ACCOUNTS

To create a new client, on your dashboard, select create new 💿 from the navigation menu.

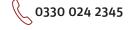
Then select Create additional client.

Please confirm clients country of tax residence is the UK and enter client details.

- Client personal details
- Client contact details
- Client employment details
- Next, read and confirm declarations and then select **Continue to summary.**
- Review summary, edit if required and then select Submit and create client.

Please be aware – log in credentials are issued immediately to clients, however, until your client's account has been linked to a product, they will not be able to view any information.

- Lastly, in order for us to create a trust or company account, please complete the relevant form and email to platformoperations@scottishwidowsplatform.co.uk.
 - These forms may ask you for a client ID, if you don't know this yet then please leave blank, our servicing team will be able to locate the client using details you've provided in the form.





service@scottishwidowsplatform.co.uk



platform.scottishwidows.co.uk

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