



STEPS TO CREATING A NEW CLIENT FOR TRUST & COMPANY ACCOUNTS

- 1** To create a new client, on your dashboard, select create new  from the navigation menu.
- 2** Then select **Create additional client**.
- 3** Please confirm clients country of tax residence is the UK and enter client details.
 - Client personal details
 - Client contact details
 - Client employment details
- 4** Next, read and confirm declarations and then select **Continue to summary**.
- 5** 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.
- 6** 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.

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 service@scottishwidowsplatform.co.uk

 platform.scottishwidows.co.uk

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