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.

0330 024 2345 service@scottishwidowsplatform.co.uk platform.scottishwidows.co.uk

SWP GD 0096 (0924 IH)