



Master user registration form

Using the editable fields?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

With this form you can:

- nominate the master user to be appointed to your adviser firm, enabling you to start carrying out business on our platform. **The term 'platform' means Quilter's technology platform, which hosts collective investments, ISAs and JISAs as well as bonds.*

We regularly update our forms; you can confirm that this **September 2023** version is the latest by checking on our website quilter.com

Note

- Only complete this form if your firm is already registered with Quilter, but a valid master user has not yet been appointed.
- A master user is responsible for setting up financial advisers within the adviser firm, for monitoring and safekeeping of passwords and usernames, and for prompt cancellation of access for individuals who leave the company.
- Once appointed, a master user can also set up additional master users to assist in carrying out these responsibilities.

Completing this form

- Tick/complete this form, as applicable, using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- The form must be completed by an authorised signatory for the firm.

Send your completed form as follows:

- **By post** - to Quilter, FAO Adviser Servicing, Quilter, SUNDERLAND, SR43 4JP.
- **By email** - to ask@quilter.com
- **By fax** - to 023 8048 1454

1. Your adviser firm details

Name of firm

Address

									Postcode

Financial Services number

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Account number

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This is the firm's account number with Quilter (if known)

2. Master user details

Title

Mr Mrs Miss Ms Other ▶ *Please specify*

First name(s)

Surname

Telephone number

Email address

Financial Services individual ref number ▶ *If a registered individual*

3. Authorisation and signature

I nominate the individual named in section 2 to be a master user for the adviser firm detailed in section 1.

Signature

Date

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Print full name

Capacity *eg director,
partner, principal*



[quilter.com](https://www.quilter.com)

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