

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.

Adviser back office software - registration request

- *Bulk Valuations*

With this form you can:

- register for bulk valuations.

We regularly update our forms; you can confirm that this October 2022 version is the latest by checking the literature library on our website platform.quilter.com

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.

Send your completed form as follows:

By email to - wfpamadviserservicing@quilter.com

1. Access requirements

Access to the software is requested for the following:

- 1.1 The authorised firm AND, IF APPLICABLE, ALL OF ITS APPOINTED REPRESENTATIVES – complete details below of the directly authorised firm.

OR

- 1.2 The appointed representative only – complete details below of the relevant appointed representative.

Name of firm

FCA number

Telephone number

Email address



2. Software requirements

ABO software - bulk valuations	Tick as required
Adviser Cloud	
Bluecoat Software – FinPlan	
Durell	
Dynamic Planner	
Focus 360	
Intelliflo – Intelligent Office	
iress – Adviser Office	
iress – X-Plan	
JCS	
MoneyInfo	
Plum/Wealthcraft	
Prestwood	
Sprint – Fastrak	
Time4Advice	
Other (please specify)	

3. Declaration and authorisation

This request must be signed by a director, partner or principal of the firm.

- Please provide access to the software requested in section 2.
- I confirm that I have the authority to give this instruction on behalf of the firm named in section 1.
- I understand that if I have ticked 1.1 in section 1, it means that valuations will be available for all appointed representatives to access.

Signature

Date

Print full name

Position within the firm

Director

Partner

Principal



platform.quilter.com

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years. Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively.

Registered Office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB, United Kingdom. Quilter Investment Platform Limited is authorised and regulated by the Financial Conduct Authority. Quilter Life & Pensions Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Their Financial Services register numbers are 165359 and 207977 respectively. VAT number 386 1301 59.