Additional user set up

This form should only be completed electronically

Once you have completed this form please send it to us via Jira messaging. If you've any questions please contact the Client Relations team on 0131 226 9535.

Adviser firm details

Company name

Firm outlet number

Full postal address

FCA registration number

Name of key operational contact

Please specify which of these two options is desired in the below table.

- Read only access – these users can see everything and update personal details, but they can't execute trades or key withdrawals
- Update access – these users have full access and can trade on client accounts.

It's the responsibility of your senior management team to let us know straight away if there are any changes to your staff (joiners/leavers) or to the certified status of advisers.

Please note that we will set up the access exactly as the details are entered below. The username box on the platform login screen is case sensitive.

New user details

Forename	Surname	Senior Manager Function (SMF)	Certified (under SM&CR)	FCA IRN Number (Advisers only)	Email address	Direct dial	Mobile number	Read only or update access	Is user an Adviser or Admin?	Is user to be linked to specific or all advisers	Does user require Jira messaging access?
		Y N	Y N								Y N
		Y N	Y N								Y N
		Y N	Y N								Y N
		Y N	Y N								Y N
		Y N	Y N								Y N
		Y N	Y N								Y N
		Y N	Y N								Y N
		Y N	Y N								Y N
		Y N	Y N								Y N