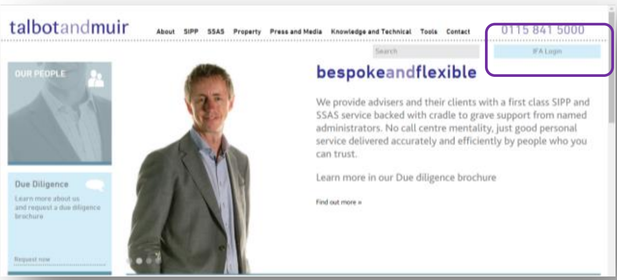
THE
talbotandmuir
SIPP

Online applications

Talbot and Muir is delighted to announce that the Talbot and Muir SIPP will facilitate online applications

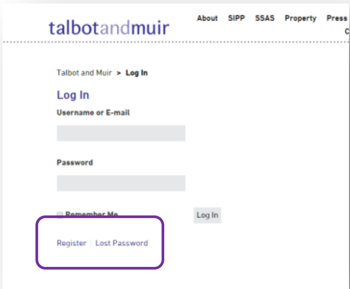
Registration for the application wizard

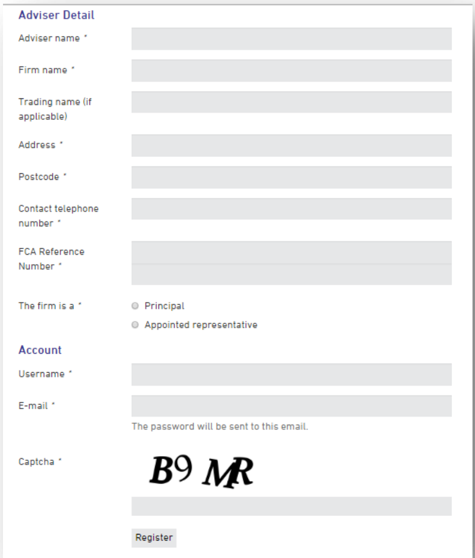


If you have previously used our application pre population wizard you will not need to register again. However if this if your first time it is a self registration process so there is no delay in sending in applications. You will need to ensure that you have completed the introducer agreement process with Adviser Support before we can accept business from your company.

If you are unsure if you have an introducer agreement with us please call Adviser Support on 0115 841 5000.

Click on the IFA Login button which will take you to the login screen where you can either login or register for the first time.



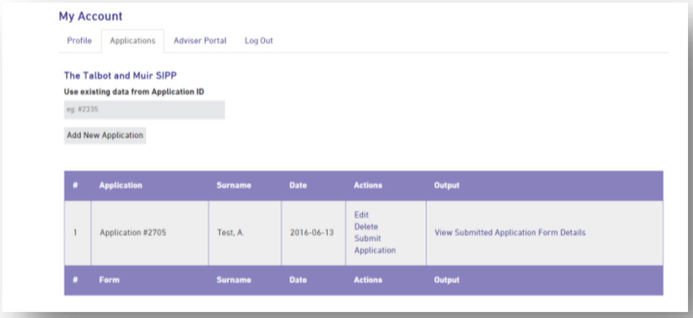


When you click to register you need to complete the fields as fully as possible because they will eventually pre-populate your client's application forms, although the details can be amended within the application form itself.

Once you click register you will receive an e-mail with a password which you must change immediately.

You are then able to start completing applications online

The online application process



All the clients' details need to be completed and saved online, once you are happy that all the information has been completed you can submit the online form to us. You can view and print the details you have entered for your records, these will be sent to the client with their cooling off notice.

SIPPs are deemed a high risk product by the FCA and so we feel that we need a wet signature from the client and yourself to confirm the client has received all the appropriate documentation and is happy with the adviser agreed remuneration and that you have given the appropriate advice and have conducted anti-money laundering checks on the client.

These signatures are collected on the Declarations form which can be signed by the client either before or after completion of the online form and can be accessed directly from the forms section of the website. You need to submit this to us with any additional documentation including any investment forms, property forms and, if applicable, transfer forms from ceding schemes. Once we have everything we can process the SIPP.

Viewing your clients on the Adviser Portal

Once you have registered online we can then attach your clients to your account. There are two levels of access available. Whichever level of access is granted, all individuals that use the Adviser Portal should have their own account and passwords should not be shared. This ensures that should a member of staff leave then we can delete their account and their access to your client data without impacting others in your company.

Individual adviser access

Individual adviser can see only the clients allocated to them on our system, this should be used in most cases to ensure client confidentiality.

Company level access

We can grant access to an individual to view all the advisers at the company and their clients. This could be used for administration staff or by the principles of the company.

Please contact adviser support to gain access to the Adviser Portal.

22-26 Clarendon Street
Nottingham
NG1 5HQ
Telephone 0115 841 5000
Facsimile 0115 841 5027

www.talbotmuir.co.uk

TMSIPP– ONLINE APP01 – Jun 16