

WEALTH INTERACTIVE

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.

This document was last updated in February 2020.

A IMPORTANT NOTES

- › Only complete this form if your firm is already registered with Utmost International for Portfolio Bond business.
- › This form should be signed by an existing authorised signatory (on record with Utmost International) on behalf of your firm.
- › The form will allow us to grant access to a nominated Master User within your firm who can then grant access to other users (including other Master Users within your firm).
- › Please complete in BLOCK CAPITALS.

B FIRM DETAILS

Name of authorised firm

Regulatory reference number

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Address of authorised firm

													Postcode	

Utmost International broker number for Portfolio Bond

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C MASTER USER DETAILS

Title (✓)

Mr

Mrs

Miss

Other

Name of Master User to be registered

E-mail address

Position in the firm held by Master User

Phone number

Mobile phone number (compulsory for Singapore firms)

D DECLARATION AND SIGNATURE (TO BE COMPLETED IN ALL CASES)

I/We nominate the individual named in section C of this form to be a Master User for the firm, appointed representative firm or outlet.

SIGNATURE

Date

d	d	m	m	y	y	y	y
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Name

Please tick here to indicate your position within the firm (✓)

Director Partner Principal Other authorised

SIGNATURE

Date

d	d	m	m	y	y	y	y
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Name

Please tick here to indicate your position within the firm (✓)

Director Partner Principal Other authorised

SIGNATURE

Date

d	d	m	m	y	y	y	y
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Name

Please tick here to indicate your position within the firm (✓)

Director Partner Principal Other authorised

Once completed please email the form to **IOMasterUser@utmostinternational.com**

- › Master Users have the highest level of authorisation on Wealth Interactive, and some of the key responsibilities of a Master User are listed below:
 - Grant access to Wealth Interactive to other users
 - Manage/remove user permissions
 - Set up additional Master Users
 - View fees/commission statements
 - Maintain firm data (for example, change bank account details, set fee packages)
 - Exercise full portfolio management permissions
- › If you are a member of a Network or National Account, your Head Office may prefer to control access to Wealth Interactive. Please contact your Head Office before submitting this form to Utmost International to confirm whether you can be granted Master User access and to prevent any unnecessary delays.

**Important note: The product(s) named in this document and to which this document relates is accurate as at December 2021 and is subject to change.
To ensure applicability with respect to a product and, if applicable, a related policy, before taking any action, please liaise with your adviser and/or contact us directly.**

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Utmost International Isle of Man Limited is registered in the Isle of Man under number 24916C.

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Tel: +44 (0)1624 655 555 Fax: +44 (0)1624 611 715. Licensed by the Isle of Man Financial Services Authority.

Utmost Wealth Solutions is registered in the Isle of Man as a business name of Utmost International Isle of Man Limited.

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