



Söderberg
& Partners

Wealth
Management

User access request form

Please fill out this form in order to arrange access to the Soderberg platform.

Organisation name





Firm Admin

Please insert the name(s) and contact information of the person(s) you would like to nominate for the role of Firm Admin. A Firm Admin has the authority to issue instructions such as adding, changing and removing users and updating company information on the platform.

If the Firm Admin requires access to the system, please ensure you enter their information within the user table on page 4 also.

Name	Role	Email address	Mobile phone number / direct dial



Platform Communications

Please confirm your office telephone number.

As a default, if we need to make contact regarding a specific client case, we will contact the client's registered Adviser. If you'd like to make an alternative arrangement, such as a central administrative mailbox, please outline the details here.

We are frequently adding developments and improvements to the platform, and occasionally we may need to communicate a change in process. Please confirm which users or which email address/es we should contact to notify of upcoming changes to the platform (if left blank, we will contact your Firm Admin/s in this event).

If there is ever an issue affecting the usability of the platform, we may need to contact you to inform you of such incidents. Please confirm which users or which email address/es we should contact to notify of incidents within the platform (if left blank, we will contact your Firm Admin/s in this event).





User Table

Name	Job title	Individual FCA number (IFA's only)	Email address	Mobile phone number / direct dial (if office no., leave blank)	Client Access - Please state specific advisers or firm level	Access to create and edit advisory models?

Please use the above table to request logins for your platform users.

N.B. IFA's added to the table above will be automatically set up with their own 'entity' which clients are created against. If there are IFA's in your firm who will hold clients on the platform, but will not be set up with their own user login, please provide us with a supplementary list including their name and FCA number.





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**Thank you for
your cooperation!**

