Set up a Client

YOUR Platform is an online only platform, so clients must have access to email and be happy for all communications to be electronic.

The platform also requires bank details for all clients.

Clients and accounts are all set up via the platform website, you can find a short guide on what the clients can expect during the onboarding on the website in the Investor User Guides section.

We would expect the vast majority of clients to be set up at the point of an illustration being created. So before creating a client, ensure that they do not exist on the platform already by searching for them. The process for creating illustrations is covered in separate user guides.

Step by step

- You can navigate to clients by either using the 'Clients' option from the top menu, or searching from any screen at the top right in the client search

- **If you have already produced a client illustration, the client will be on the platform with the status as 'Registered'**. In this case, click on the client and click the 'Client details' button underneath the client's name, and click on 'Edit' on the right

- Where an Illustration has not yet been completed, on the 'Clients' screen, click the 'Create new client' button on the right-hand side

- In either case, you will then see the client details screen

- Update or complete all the client information. Required fields are noted with *. All sections on the left-hand side must show a green tick in order to save these details – it is wise to complete as much detail as you can to avoid future complications when new accounts are needed

- The 'Pension Details' section is required for clients expecting to open a pension. When 'Yes' is selected for making employer contributions, you will be asked for details on their employer. Please note, this is only needed for clients who will be setting up employer contributions.

- Once complete, click 'Review'

- Check the details entered and click 'Submit' once happy. **This will generate the email to the client to complete the onboarding process**

- The client status will then show 'Pending'. At this point, you can set up accounts for the client but cannot yet fund any accounts as the client needs to complete the onboarding process and agree the terms

- Once the client agrees the terms, the client status will change to 'Active', and you can then submit transfers and payments