Power of Attorney

YOUR Platform can accept cases for clients under a Power of Attorney. There are some additional steps required and some points to ensure you and the attorney are clear on, to be comfortable with suitability of the platform.

Important considerations

1. YOUR Platform is entirely online based. We cannot provide postal statements, contract notes or similar documents. The attorney must be comfortable this is in line with requirements for them to oversee the client's affairs
2. You must have followed your usual AML manual for identity checks for both the beneficial owner and the attorney

Specific requirements

1. You should create the client and accounts purely in the client's (beneficial owner) name but use the attorney's email address to ensure they can accept the terms and receive notifications as required
2. YOUR Platform has no indicator on the website interface to record the case as a Power of Attorney case. You must email Questions@YOUR-Platform.co.uk when creating the client to confirm the client ID, and the identity and details of the attorney. The team will record this as the case. We require the following information for the attorney:
    - Name
    - Date of Birth
    - National Insurance Number
    - Address

YOUR Platform is a trading style of YOU Asset Management Limited which is authorised and regulated by the Financial Conduct Authority. YOU Asset Management Limited is registered in England & Wales. Company No. 06150317. Registered Office: C/O Freeths Llp 3rd Floor, Northgate House, 450-500 Silbury Boulevard, Milton Keynes, England, MK9 2AD