

ACCOUNT CREATION AND USER REGISTRATION FOR NETWORK HEADS

WHO IS THIS FORM FOR?

This form should be used by Master Account Holders in a Network Head structure to create a name for their Master Account, and to appoint a Master User, known as the Network Head User (NHU), to administer the account.

WHAT IS A MASTER ACCOUNT?

Our Online Service Centre (OSC) offers different levels of user access. The Master Account is the highest level and at least 1 administrator, NHU, must be appointed to manage the account. The NHU will have the ability to create Sub-Users, known as "Admin Users" (AU) without the need to complete further forms.

Our *Online Services Setup Guide* explains, in detail, the different ways in which access to our OSC can be set up.

COMPLETING THIS FORM

Please make sure that you complete and sign a Master Account Agreement and send it alongside this form (for new account set ups). We cannot create a Master Account until we have received the Agreement.

Please complete in BLOCK capitals and make sure that you fill in all the fields, as a failure to do so can lead to delays. If you need help please contact our Web Support Team on +44 (0)1624 681685 or alternatively you can email websupport@rl360.com.

NETWORK MEMBERS

This form can only be used to set up a Network Head Master Account, and associated NHUs. A NHU can create a Master Account for a Network Member that does not currently hold a Master Account, and act as Master User within this account, including being able to create Sub-Users.

If you need to create Master Users within a Network Member Account, then you will need to complete the Account Creation and User Registration form for standalone financial/investment advisers and Network Members.

WHEN YOU HAVE COMPLETED THIS FORM

Please send the original by post direct to: Web Support, RL360, International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

PRIVACY POLICY

Our full privacy policy can be viewed at www.rl360.com/privacy or can be obtained by requesting a copy from our Data Protection Officer.

For Network Head Master Accounts

PART 1

Please confirm whether you are setting up the account for the first time or adding Master Users to an existing Master Account (please tick as appropriate).

First time setup ☐ New users for existing account ☐

Please provide us with your company name, current address and RL360 adviser number.

Company name	<input type="text"/>
Registered office address (including postcode and country)	<input type="text"/>
RL360 adviser number	<input type="text"/>

PART 2

Would you like to provide us with a name for your Master Account?

PART 3

Please provide full details of the Network Head User you wish to set up as part of your Master Account.

Failure to complete all the details can lead to delays processing your request.

Title (please tick)	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Other (in full) <input type="text"/>
First name(s)	<input type="text"/>			
Last name(s)	<input type="text"/>			
Date of birth (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Position held	<input type="text"/>			
Email address	<input type="text"/>			
Telephone number	<input type="text"/>			
Single use password	<input type="text"/>			
Password reminder	<input type="text"/>			

☐ Please tick this box if you would like the user to have access to commission statements online.
If this option is selected then please arrange for the form to be signed by a Company Director.

By signing below, Master Users agree to abide by the terms and conditions as described within the Master Account Agreement.

New Master User

Signed

Date (dd/mm/yyyy)

I agree to RL360 setting up the above Master Users for the stated Master Account.

Company Director/Partner/Authorised Signatory on behalf of the Master Account Holder

Signed

Full name

Position held

Date (dd/mm/yyyy)