

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.

Adviser back office software - registration request

- *Bulk Valuations*

With this form you can:

- register for bulk valuations.

We regularly update our forms; you can confirm that this October 2024 version is the latest by checking the literature library on our website [quilter.com](https://www.quilter.com)

Completing this form

- Tick/complete this form, as applicable, using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.

Send your completed form as follows:

By email to – wfpamadviserservicing@quilter.com

1. Access requirements

Access to the software is requested for the following:

- 1.1 The authorised firm AND, IF APPLICABLE, ALL OF ITS APPOINTED REPRESENTATIVES – complete details below of the directly authorised firm.

OR

- 1.2 The appointed representative only – complete details below of the relevant appointed representative.

Name of firm

FCA number

Telephone number

Email address



2. Software requirements

ABO software - bulk valuations	Tick as required
Adviser Cloud	
Contengo	
Durell	
Dynamic Planner	
Focus 360	
IFAMS	
Intelliflo – Intelligent Office	
iress – Adviser Office	
iress – X-Plan	
JCS	
MoneyInfo	
Plannr	
Plum/Wealthcraft	
Prestwood	
Sprint – Fastrak	
Time4Advice	
Twenty7tec - FINPLAN	
Other (please specify)	

3. Declaration and authorisation

This request must be signed by a director, partner or principal of the firm.

- a) Please provide access to the software requested in section 2.
- b) I confirm that I have the authority to give this instruction on behalf of the firm named in section 1.
- c) I understand that if I have ticked 1.1 in section 1, it means that valuations will be available for all appointed representatives to access.

Signature

Date

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Print full name

Position within the firm

Director

Partner

Principal



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