

**The new
Quilter
mobile app –**
How to check
and update your
adviser details?



The Quilter app has been designed to prominently display your details to your clients, to help reinforce the importance of the advice you provide.

Here's a quick look at the areas where your adviser details will be displayed in the customer app:

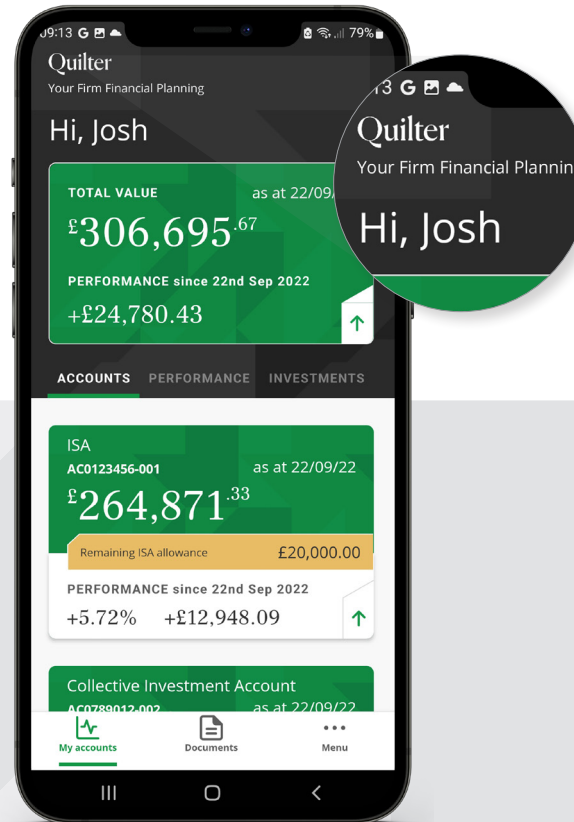
1

When opening the app



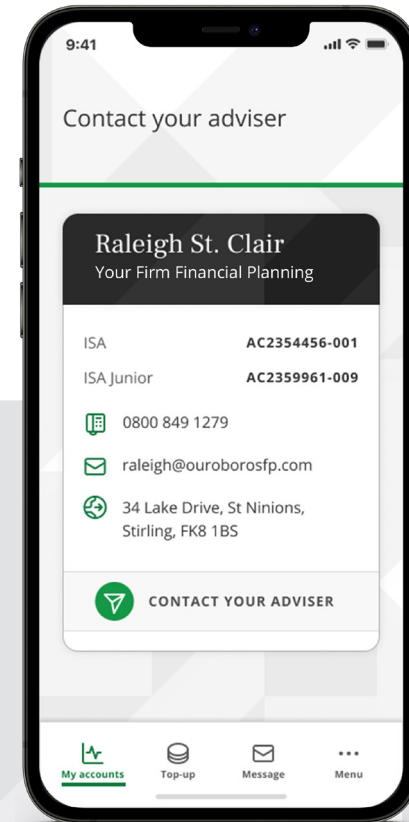
2

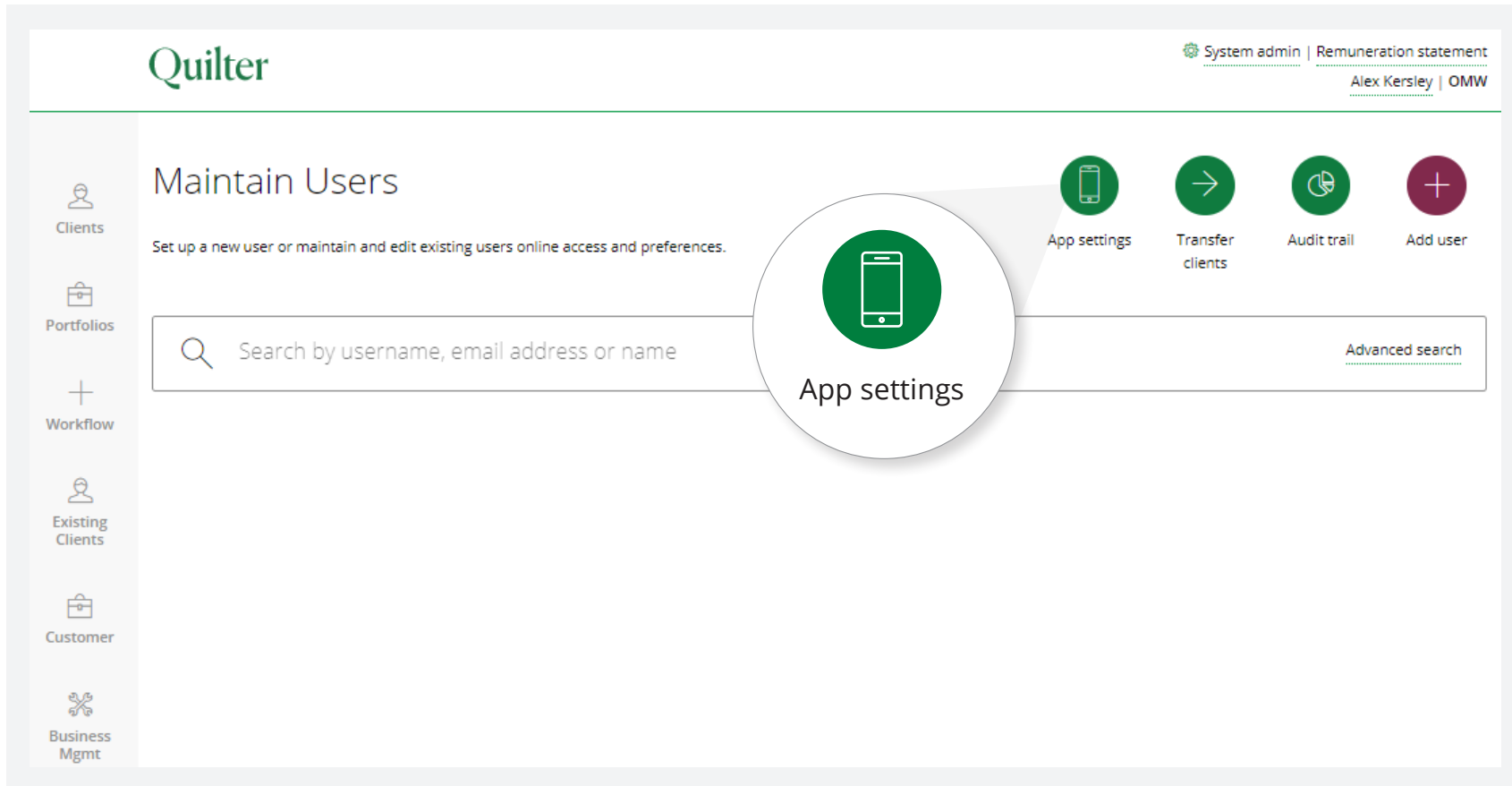
On the Home and Menu screen



3

Under 'Contact your adviser', available through the Menu





Checking and updating your details

To check and update your details so that they show correctly in the Quilter app, your Master User can log in to the platform, click on 'System admin' and then the 'App settings' button in the top right-hand corner of the screen .

This will lead to a page called 'Customer App controls' where you can review and control what will be displayed, including:

- ▶ Company name
- ▶ Phone numbers
- ▶ Address
- ▶ Email

The Master User within your firm has overall control of the details that appear in the app. The Master User is the person with full administrative control of access to the Quilter platform in your business. This may typically be the principal, managing director or office manager.

Customer App controls

APP CONTROLS COMPANY NAME PHONE NUMBERS ADDRESS EMAIL

Please be advised that changing this setting will alter how the individual adviser details are displayed to the Quilter customers within the Quilter App. See Help Pages for more information.

App Co-branding On Off

Book appointment On Off

Adviser name On Off ! You are not able to turn this off

CANCEL WITHOUT SAVING SAVE

The app controls tab

► **'App co-branding'** – This function is defaulted on to ensure your firm name appears when opening the app, on the home screen and menu. If you choose to switch this function off, your firm name will no longer show on the screens mentioned.

► **'Contact your adviser/ Book an appointment'** – This function is defaulted off. If you choose to switch this on, your client will be able to contact you by filling out and submitting a short request form which will be sent directly to you.

► **'Adviser name'** – Adviser name will always appear in the 'contact your adviser' section of the app.

Make sure you click 'Save' after making any changes to ensure any updates pull through to the app.

The next 4 tabs allow you to control what company and adviser details will be seen in the 'Contact your adviser' section of the app.

Please note: Each tab shows the details as they will appear on the app, in the middle columns.

Customer App controls

APP CONTROLS | **COMPANY NAME** | PHONE NUMBERS | **ADDRESS** | EMAIL

Please be advised that changing this setting will alter how the individual adviser details are displayed to the Quilter customers within the Quilter App. See Help Pages for more information.

NAME	Company name displayed	Firm	Branch	Off
SET ALL		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dummy User1029566	2h Wealthcare LLP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dummy User1029567	2h Wealthcare LLP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dummy User1029631	2h Wealthcare LLP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

! This adviser is not attached to a branch

! This adviser is not attached to a branch

! This adviser is not attached to a branch

'Company name' and 'address' tabs

- ▶ The 'company name' and 'address' tabs allow you to choose if you want firm or branch level details (if appropriate) to display in the app. You also have the option to switch these details off.
- ▶ You can set the same information to show for all advisers by using the 'Set all' check boxes in the top row, or you can tailor to each adviser using the check boxes to the right of an adviser's name.
- ▶ In the unlikely event that your company name or address is showing incorrectly you can contact us to get this amended.

Please note: Non adviser users will also appear in this list. As their details will not appear in the app, you can disregard these users along with any red triangles or incorrect telephone numbers that may appear for them.

If you need to make changes to any of the details within these 2 tabs, such as updating phone numbers, or email addresses, you will need to click on the individual adviser's name to do so.

'Phone number' and 'email' tabs

System admin | Remuneration statement
Alex Kersley | OMW

Customer App controls

APP CONTROLS COMPANY NAME PHONE NUMBERS ADDRESS EMAIL

Any individual telephone numbers can be edited on the individual adviser page

NAME	Telephone number	Display in app
SET ALL		<input checked="" type="checkbox"/>
Dummy User1032942	02380123456	<input checked="" type="checkbox"/>

CANCEL WITHOUT SAVING SAVE

Customer App controls

Any individual email address can be edited on the individual adviser page

NAME	Email address	Display in app
SET ALL		<input checked="" type="checkbox"/>
Dummy User1029566	am@am.com	<input checked="" type="checkbox"/>
Dummy User1029567	am@am.com	<input checked="" type="checkbox"/>
Dummy User1029631	am@am.com	<input checked="" type="checkbox"/>
Dummy User1041632	am@am.com	<input checked="" type="checkbox"/>
Dummy User1041633	am@am.com	<input checked="" type="checkbox"/>

- ▶ The details on the 'phone number' and 'email' tabs will pull through to the 'Contact your adviser' section of the app only.
- ▶ You can use the 'Set all' check boxes in the top row of the two tabs to set phone numbers and email addresses to show for all advisers in your firm, or you can use the check boxes to the right of the adviser's name to tailor the information shown for an individual adviser.
- ▶ If the phone number or email address has been entered in an invalid format, then this will be indicated by a warning triangle and will not show in the app until it has been corrected.

Whilst it is the Master User within the firm that has overall control of the details that appear in the app. Individual advisers who are not Master Users can change their email address separately in the Quilter Platform and any changes will automatically be shown in the Quilter app.

If you require further assistance in controlling how your data is shown within the app, please speak to your local Quilter platform specialist.

platform.quilter.com

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

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