

For
advisers

Personal Portfolio

Curated by  Marlborough

User details

Personal Portfolio user details V1.1

01. ADDITIONAL ADVISER FIRM DETAILS

Please provide the below bank details to enable us to pay you adviser fees directly to you.

Bank name:

Account number:

Sort code:

BIC or IBAN number (where applicable):

Email for fee statements to be sent:

02. USER DETAILS

Please provide the below details for the employees at your organisation that require access to the Platform.

First name:

Last name:

Email:

Mobile number:

Role:

First name:

Last name:

Email:

Mobile number:

Role:

First name:

Last name:

Email:

Mobile number:

Role:

First name:

Last name:

Email:

Mobile number:

Role:

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