

Investec For Advisers

Quick Start Guide

1 Go to www.investecforadvisers.com

2 There are three sign up options to choose from:

Sign up as an IFA firm (inc. AR firms)

Use this option if you are:

- An adviser firm
- A single-adviser (sole trader) firm
- An Appointed Representative of a Principal Firm or a Network

Sign up as a Principal Firm or Network

Use this option if you are:

- A Principal Adviser Firm (who is responsible for one or more Appointed Representatives)
- A Network

Sign up as a Financial Adviser

Only use this option if you are an individual financial adviser whose firm has already signed up to Investec For Advisers.

3 Enter the details of your firm. You will need your firm's FCA number and Companies House number to hand.

4 Enter your personal details. Since you're signing up your firm for the first time, you will be made a "Firm Administrator". You can add/change Firm Administrators later if needed.

You will need to enter your phone number which will be used for the platform's two-factor authentication. We strongly suggest that you use your mobile phone number. Please do not use a switchboard phone number

5 Check the information that you've entered and click "Register"

6 You will now receive a verification email. Click the link in the email to set up your password and complete your registration

Have any questions?

Once you have signed up, you will be able to access the full Investec For Advisers user guide.

Alternatively, you can call us on [+44 207 597 4045](tel:+442075974045)

