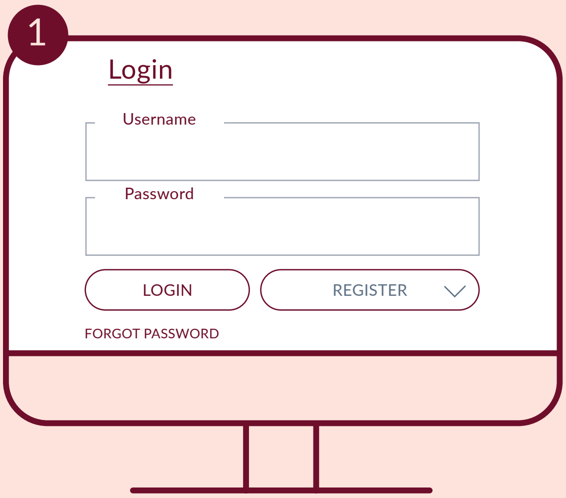
LiveMore,

How to register your firm

Visit the Broker Portal https://portal.livemorecapital.com/bp/login

Click **‘Register’** and select **‘Firm’**

1



2 You will be automatically forwarded to the **‘Register a New Broker Firm’** page where you will be required to complete all of the fields:

a. Firm FCA Registration Number

b. First name of key contact

c. Surname of key contact

d. Admin email address –this is the email address of the **‘user’** e.g. **name@firmname.com**

e. Firm Name

f. Do you require any additional permissions for this account? (Select one of the ‘Yes’ options if you require the ability to submit applications as an Adviser or on behalf of an Adviser).

3 The current permissions model is as follows:

No
Can amend firm details (email, address, phone no.) and run MBC calcs

Yes
Adviser Support: Can also submit FMA’s on behalf of a broker

Yes
Adviser: Can also submit their own FMA’s

4 Once you have submitted the above information, click **Register**

5 You will then be asked to complete your Company Details by submitting the following fields:

- Address Line 1
- Town / City
- Postcode
- Company email address*
- Company phone number

*This is the email address of the **'firm'**. You can use the admin email address provided if you wish e.g. (info@firmname or name@firmname) Company phone number.

6 You will then be asked **'does your firm belong to a network?'**

Yes

If **'Yes'** to the above question then please submit your **FCA Network number** (if your network is not listed please get in touch with the Sales Team).

No

If **'No'** to the above question then you will need to select your preferred club submission route.

7 Then click **Register**

8 We will then verify and activate your account (this could take up to 24 hours).

9 Once fully activated, **three confirmation emails** will be sent:

1

The first email will be sent to the **'Firm email address'** you provided confirming the firm has been activated.

2

The second email will be sent to the **'Firm email address'** confirming Adviser and Adviser Support users can now register themselves and start using the platform.

3

The third and final email will be sent to the **'Admin email address'** with details to access the platform.

Please note - directly authorised firms, we will also send you our standard terms of reference document to sign along with a short due diligence questionnaire. Appointed representatives of a network will automatically be approved under the network agreement.

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