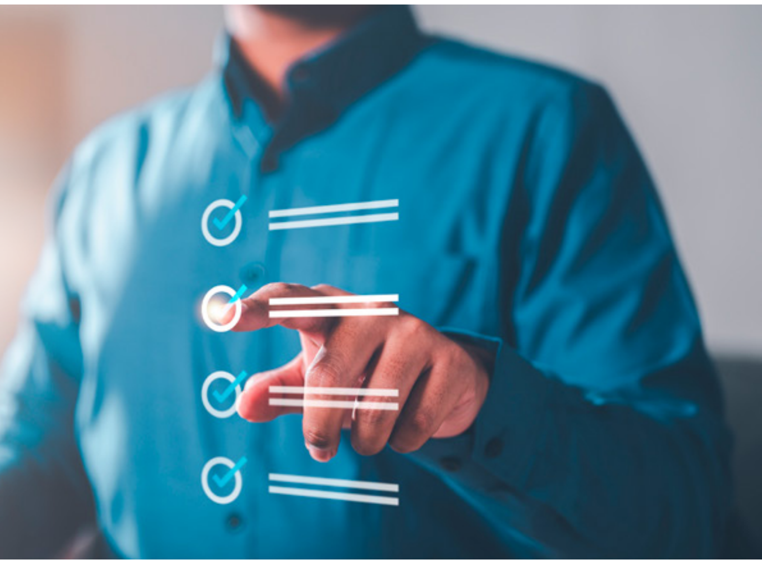


Ardan online application checklist

You can onboard new clients onto the Ardan platform in just 30 minutes with our online application. Use our checklist below to get your clients onboarded as quickly and efficiently as possible.

01

ADVISER/ADMIN

Adviser/admin logs in to their existing Ardan online account and starts a new application under the section 'Onboarding'.

After completing some basic questions the system triggers an Ardan-branded email to be sent to the client. Ideally this process is completed while the adviser is with the client or over a video call so the client expects the email and has their ID and proof of address ready.

02

CLIENT

The client accesses the email link on their phone which downloads and opens ID-Pal to their phone. ID-Pal then takes the clients through a few simple steps where they scan their ID and upload or a take a photo of their proof of address document.

Once completed the system sends an email to the adviser to let them know the client has completed the verification.

03

ADVISER/ADMIN

The adviser/admin logs back into the online application and will find the personal details section has been automatically completed. The user can now complete the rest of the application ideally with the client, if not from the details held on the fact find.

The system will now send a DocuSign request to the adviser and client.

04

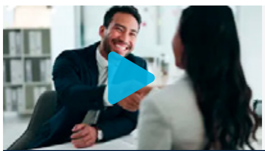
ADVISER/ADMIN

When the DocuSign requests have been completed, the system will move the application to the 'Ready to Submit' area. The system will send an email to those with 'Submit Rights' letting them know there is an application to review and submit.

Application will be activated immediately or referred to Ardan for priority review.

YouTube

Visit the Ardan YouTube page to view more helpful videos that show you how to onboard your clients quickly and efficiently.



FOR ADVISERS

FOR CLIENTS

IMPORTANT NOTES

For financial advisers only. Not to be distributed to, nor relied on by, retail clients.

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