

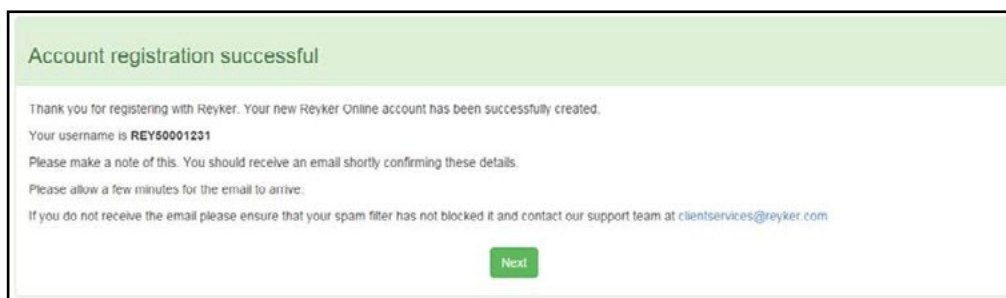
UNICORN AIM INHERITANCE TAX PORTFOLIO SERVICE



Advisor Online Registration Guide

Step 1 - Create an Advisor Account

- You can create an account with Reyker Nominees in three to four minutes online - **click here** to go to the registration page
- Once registered you will see the message below and will be sent two emails containing:
 1. Your unique password
 2. Your username



- Using your username and password, you can now log into Reyker's adviser portal. **Click here** to go to the login page
- If you have any issues logging in, **this video may be helpful**
- Reyker's advisor portal is the home for all your clients' documents and will allow you instant access to their welcome letters, completion statements, bi-annual valuations, annual tax statements and quarterly manager updates and commentary relating to your clients

Step 2 - Create Accounts for Your Clients

- Each client must also create an account; they can do this themselves or with you by **clicking here**
- The client account also takes three to four minutes to complete and the client will need their **National Insurance number** and **Tax identification number** to hand
- The client will also receive two emails containing their unique username and password, allowing them to access their unique client portal

Step 3 - Submit an Application for Investment

- You can now begin to fill out an Application Form for your client, choosing either the Income or Growth options by **clicking here**
- The first step is to enter your client's details. Reyker will then match this to the client's account they have on file before allowing you to continue
- An application for investment takes 15-20 minutes to complete and includes:
 1. The option of ISA transfers
 2. Client suitability
 3. Adviser declaration
 4. Payment options
- Payment can be made by debit card (up to £100,000), bank transfer or cheque

Step 4 - Confirmation of Monies

- Once the Application for Investment is completed you and your clients can expect a welcome letter to say monies have been received safely and are waiting to be allotted
- This will be followed by a completion statement outlining the split of your client portfolio's investments

Please contact the LGBR team on the details below if you have any further queries on the online registration process:

Tel: 020 3195 7100

Email: sales@lgbrcapital.com

Web: www.lgbrcapital.com

Important Notice:

Issued and approved by WM Capital Management Limited, 80 Coleman Street, London, EC2R 5BJ.
WM Capital Management is authorised and regulated by the Financial Conduct Authority and is entered in the Register under reference no. 601025.