

How to find new platform documents and forms

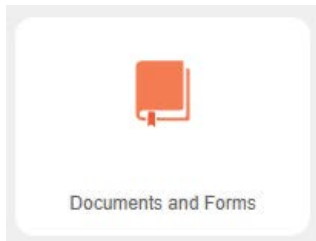
One

Click **Reference Hub**.



Two

Click **Documents and Forms**.



Three

Select the form which you need.

Set up a new client account

Client Application	Junior ISA Application	Pension Account Client Application	Terms	Client Representative Form
Charges Document	Key Features of the Platform	Key Features of Junior ISA	Direct Debit Instruction	Confirmation of Verification of Identity Certificate
Charity Application	Corporate Application	Trust Application	Entity Self-certification Form	Individual Self-certification Form

Add more money or assets to a client account

ISA Transfer Instruction	Junior ISA Transfer Instruction	Third Party Transfer Instruction	Direct Debit Instruction	Crest Transfer Form
Cash Deposit Order Form	ISA APS Subscription Form	ISA APS Allowance Transfer Instruction	ISA Application	Stock Transfer Form

Add a new product for my client

ISA Application	Junior ISA Application	Key Features of Junior ISA	Junior ISA Change of Registered Contact
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Manage a pension account for my client

Key Features of the Ascentric Pension Account	Pension Account Application	SIPP Benefit Payment Form	SIPP Employer Contribution Form
SIPP Permitted Investments	SIPP III Health Benefits Form	Expression of wish	SIPP Transfer Instruction

Pay me my fee

Ad hoc Adviser Charges Form	Changes to Adviser Charges Form
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