



# Master user registration form

**With this form you can:**

nominate the master user to be appointed to your adviser firm, enabling you to start carrying out business on our platform.

We regularly update our forms; you can confirm that this **February 2026** version is the latest by checking our website [guilter.com](http://guilter.com).

 - Only complete this form if your firm is already registered with Quilter, but a valid master user has not yet been appointed.

- A master user is responsible for setting up financial advisers within the adviser firm, for monitoring and safekeeping of passwords and user names, and for prompt cancellation of access for individuals who leave the company.

- Once appointed, a master user can also set up additional master users to assist in carrying out these responsibilities.



## *How to complete your form*

The form must be completed by an authorised signatory for the firm.

- **Option 1 (electronic):** Save the form to your desktop, open it in **Adobe Acrobat** to complete the editable fields, then either print and sign it, or sign it digitally.
- **Option 2 (by hand):** Print the form and complete it in BLOCK CAPITALS using blue or black ink.
- **Date Format:** please use **DD/MM/YYYY**



## *How to send us your form*

Simply scan your completed form and email it securely marked FAO Adviser Servicing to:  
**[ask@quilter.com](mailto:ask@quilter.com)**



Or

Send it by post to:  
Quilter, FAO Adviser Servicing,  
SUNDERLAND, SR43 4JP



Alternatively, you can fax us your form FAQ Adviser Servicing on 023 8048 1454.

### 1. Your adviser firm details

Name of firm

### Address

### Financial Services number

*This is the firm's account number with Quilter (if known)*



## 2. Master user details - mandatory

Title      Mr      Mrs      Miss      Ms      Other ► *Please specify*

First name(s)

Surname

Mobile telephone number      Email

Financial Services individual ref number ► *If a registered individual*

## 3. Authorisation and signature

I nominate the individual named in section 2 to be a master user for the adviser firm detailed in section 1.

Signature

Date

Print full name

Capacity *eg director, partner, principal*



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