

Exweb Administrator

application form

Exweb distinguishes between the roles of Adviser (RI) and Administrator. All existing Exweb accounts are automatically set up as Adviser accounts, but any of these may be switched to Administrator accounts by request.

Please complete this application form if you wish to apply for administration rights for any existing Exweb accounts held by your organisation. Setting up a user code to have administration rights will allow the nominated user code to manage client details, associated quotes and electronic new business applications on behalf of the adviser users in your office.

If you require a new Exweb account for administration access you can either apply online from the Exweb Login page or you will need to complete an Exweb application form. Please contact the Sales department on 08450 53 0490 (select option 2) or email: sales@exchange.co.uk for further information.

Please note that this application form needs to be completed and signed by either the principal of the company, an authorised signatory or a compliance officer.

Contact details	
Contact name:	Position:
Company name:	IFA network/business support group
FSA no:	
Address:	
	Postcode:
Tel number:	Fax number:
Email:	

Account details		
Please list below the user codes for which you require administration rights. Please indicate if you would like to change the password on these accounts for increased security.		
User Code	Login ID	Tick box to change password
1.		<input type="checkbox"/>
2.		<input type="checkbox"/>
3.		<input type="checkbox"/>
4.		<input type="checkbox"/>
5.		<input type="checkbox"/>
6.		<input type="checkbox"/>
If you have more than six accounts which require administration rights please attach a separate sheet with user code details.		
Reminder: Setting up a user code to have administration rights will allow the nominated user code to have access to the client details, associated quotes and electronic new business applications for the advisers in your office. These details will be confirmed to you in writing once the account amendments have been made.		

I, the principal/authorised signatory/compliance officer of the above named company duly authorise the administration set up rights for the accounts listed above.

Signed:

Name:

Date:

Position:

Please note that the standard Exweb Terms and Conditions will apply. A copy of the standard Terms and Conditions is available from the Exweb homepage or by calling our helpdesk on 08450 53 0490. The pricing of any services provided by Exweb will be determined on the tariff document as and when updated.

Authorised and regulated by the Financial Services Authority.

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The Exchange
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