

## FOR ADVISER USE ONLY

### Elevate paperless processes – How to video - transcript

We've made it easier to process new cases and service your existing clients by introducing a paperless process for our platforms.

You'll see on the left hand side the documents we will now accept as copies.

- Terms & Conditions
- Adviser Charge Agreement
- Direct Debit Mandate
- Transfer Forms – *cash transfers*
- Transfer Forms – *ISA & GIA re-registration*
- Expression Of Wish
- Employer Record of Payment Form

The client will still have to sign each document where appropriate but we are able to accept a scanned copy or photo copy where a client or adviser can use their camera phone.

You'll see on the right hand side there are a couple of instances we still require wet signature

- Defined Benefit transfer forms
- Transfer forms – *pension re-registration*

It's really important even though you send us copies of the documents you keep the originals until the case is complete.

You can upload documents to the client's account in their Reports & Documents library.

You'll need to have the documents saved to your computer or laptop and then in the Reports & Docs library click the ADD button.

A pop up will appear where you can name the document on our list of prepopulated names (in this example an Adviser Charge Agreement)

Change the status to 'Received from Client' so our operations team can identify the documents quickly

Finally click browse and upload the document.

You'll need to upload each document one at a time.

After uploading the documents to the library we ask you send us a quick email to [elevate\\_enquiries@standardlife.com](mailto:elevate_enquiries@standardlife.com) with the subject title Platform Sign Up and the EL account number.

Our team will pick up the email and process the documents as quickly as possible.

It's worth reminding we use Origo for pension transfers and while not every pension policy can be processed on Origo for the ones that can you could be keying your new case, uploading the sign up paperwork and Elevate could match and apply for the pension transfer all on the same day.

When it comes to sending Elevate money please consider if its possible to pay electronically by online banking. In the theme of speeding up the process and making it more efficient this helps us match your client money and get invested as quickly as possible.

Where it's not possible to pay electronically we can accept cheques sent to (Read address).

Regardless of which method you send money please ensure you reference the client EL account number.

If you have any questions please get in touch with Elevate on 03456 100 2399 or speak to your account manager

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