

# How to Guide: Adding Beneficiaries

1. Log on using your credentials ensuring you are logged on as a user who has "Read/Write" permissions.
2. You now need to search for the client, this is done on the left-hand menu under "Existing Accounts" and "Search". Please note that the client must hold a pension product.
3. You can search for clients by the account number, name of individual adviser, or customer name, click on the "Search" button and a list of the clients within those search parameters will appear. If there is more than one matching the details provided, click on the relevant "Account Number", which are shown in blue.

ACCOUNT SEARCH

Search   Advanced Search   By Investment

Search criteria

Platform Provider	EIS	Account Holder First Name:	
Enter Account Number:		Account Holder Surname:	
		Select Adviser:	All
		Account status:	All

Search

4. Click on "Account Holders" on the left-hand menu after selecting a client from the search results.

existing accounts

- search
- cash account
- summary
- portfolio
- new work
- account holders**
- transactions
- reports & documents
- charges & remunerations
- contacts

5. Upon landing on the Account details screen, proceed by clicking on "Pension Details" screen using the navigation bar at the top of the page.

Account Details   Contact Details   Banking Details   Other Details   **Pension Details**   Account Structure   Suspended Activity

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6. Upon landing on the "Pension Details" screen there will be a 'Beneficiaries for SIPP' table. Select the Edit button and select Yes from the Expression of Wish drop-down list. The Expression of Wish table will be displayed.

Role	Name	Relationship	Proportion
None registered			

7. Use the drop-down list to state whether the beneficiary is an individual or a company. Select 'Add' to enter details of the beneficiary including the proportion to be allocated followed You have the ability to add as many beneficiaries as the customer requires, but you must ensure that the total "Proportion" adds up to 100%.

Beneficiary - Individual Add

8. You then need to select "Save Nominee" to save the beneficiary details.

Beneficiary details

Title

First name(s)

Surname

Date of birth

Relationship to client

Proportion  %

Residential address

Address Type

Country

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Postcode  Find

Cancel Clear Save Nominee

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9. Click on the "Save" button on the top right-hand corner of the Beneficiaries for SIPP table. Once you have done so the Platform will give you confirmation that the change has been successfully updated.

Beneficiaries for SIPP Cancel Save

Do you want to setup an Expression of Wish?  Yes

**Expression of Wish**  
By completing an Expression of Wish form the client can indicate to whom they would like the Scheme Administrator to consider paying the lump sum

Role	Name	Relationship	Proportion	
Individual	T Test	Spouse	100.00%	Edit Delete

Beneficiary - Individual Add

Client EM1412198 successfully updated.



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