



## Solidus Asset Preservation Trust Process

Optional pre-sales support, client facing webinars, email your Client Overview Form



support@solidustrusts.co.uk

Determine whether policy is SIPP, DiS or if pension is trust based or contract based

Download Application Form from Solidus website and complete with client details



<https://www.siep.co.uk>

Have Application Form signed by adviser and client, or email your client's authorisation



applications@solidustrusts.co.uk

Solidus review application, request additional information if required and raise invoice

Pay invoice by bank transfer

Solidus draft documents and email Adviser drafts for client approval

Liaise with client to approve case summary and email confirmation

Draft Trust approved by Solidus legal partners

Solidus print and send final documents to Adviser:  
a) Signing Pack b) Posting Pack

Arrange document signing by Trustees and client

If you require Solidus to verify documents are signed correctly, email copies



verifications@solidustrusts.co.uk

If you want Solidus to do HMRC Trust Registration, email copies



registrations@solidustrusts.co.uk

Send notices and copy documents to the provider (Posting Pack)

Provider confirms acceptance to the adviser

If storage is required send originals back to Solidus by post