

SOLIDUS

Solidus Multiple Bond Trust Process

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



support@solidustrusts.co.uk

Solidus will suggest planning approach

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

Pay invoice via BACS once received

Each stage of the process is emailed to you and can be viewed in Trustworks

Liaise with client to approve case summary and email confirmation

Solidus review the case and develop/confirm the advice

Draft Letter of Wishes emailed to adviser

Draft documents sent to legal partners for verification

Arrange document signing by Trustees and client

Solidus print and send final documentation

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



verifications@solidustrusts.co.uk

Once the Trust is established, send copy documents to the provider

Solidus will email approval within two working days of receipt

If storage is required send originals back to Solidus by post

Provider confirms acceptance to the Adviser