

SOLIDUS

Solidus Assurance Trust Process

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



support@solidustrusts.co.uk

Check policies not already in the Trust and consider applying for multiple Trusts for large policies to minimise periodic charges

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

Solidus draft documents and email a case summary for approval

Draft documents sent to legal partners for verification

Solidus print and send final documentation:
a) Signing Pack b) Posting Pack

Liaise with client to approve case summary and email confirmation

Signing Pack:
Original documents for the Trustees and client to sign

Posting Pack:
Photocopies of the documents to be sent to the provider

Arrange document signing by Trustees and client

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



verifications@solidustrusts.co.uk

Send copy documents to the provider (Posting Pack) once signed

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