

## Adviser Registration Procedure

As an independent financial adviser with Rowanmoor Pensions SIPP clients, you have access to **SIPPView**, the online service for the Rowanmoor Pensions SIPP.

**SIPPView** makes it possible to view a wide range of information about a Rowanmoor Pensions SIPP online, including valuations, financial transactions, asset holdings, benefit details and adviser fees.

Registration is a two stage process.

### Stage 1 - Security Registration

- 1 First client's SIPP application submitted to Rowanmoor Pensions.
- 2 We will issue you with a personal Security Questions Form. We will only be able to answer your telephone queries and provide you with access to **SIPPView** once we receive this information.
- 3 You complete the form and return it to us in the pre-paid envelope provided.
- 4 Your data is added to **SIPPView**, awaiting activation and we will issue your unique ID and details of how to sign up.

Once registered, your future clients will be added, automatically, to your **SIPPView** portfolio.

[www.rowanmoor.co.uk/SIPPView](http://www.rowanmoor.co.uk/SIPPView)



Rowanmoor Pensions

## Stage 2 - SIPPView Registration

To sign up, visit [www.rowanmoor.co.uk](http://www.rowanmoor.co.uk) and follow the link to **SIPPView**.



Follow the **Sign Up** link.



To activate your account, enter your:

- first name;
- surname;
- email address, which must match the email address you gave on the Security Questions Form;
- unique ID.

You will be asked to answer two further questions, using the answers you gave on the Security Questions Form.



Finally, you will be asked to choose a username and password, which you should use on all future visits to **SIPPView**. Your username must be unique and a check will be performed to ensure the one you choose is not in use. Passwords must be at least eight characters long, are case sensitive, stored under the latest encryption techniques and are not accessible to anyone internally at Rowanmoor Pensions.

You are now ready to use **SIPPView**.

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