

Starting your journey with M&G Wealth Platform

“ We cannot speak more highly of our experience of the platform to date. The Adoption team have been coordinated, efficient and they have delivered on what they promised.” Tom Poynton
Baron & Grant Investment Management Ltd

Working together We'll support you every step of the way, fully understanding your needs and helping you get the best out of the platform. This means:

1

As you get set up, you'll have a dedicated, proactive Platform Adoption Consultant, who'll help you, throughout every stage of the journey.

2

Your Platform Adoption Consultant will organise bespoke platform training to meet your needs, in a way that works for you.

3

Your Consultant will introduce you to a Customer Service colleague when you're ready to set your clients up on the platform. They'll take care of your first applications.

4

Once you're confident using the platform, we'll put you in touch with your ongoing key contacts in the Customer Service team. They'll support you with day-to-day queries.

5

Your Platform Adoption team will still be there for you. They'll keep in regular contact after you've joined, providing support with any platform training you need in future.

Moving your clients collectively When you want to bring all your clients over to M&G Wealth Platform, in a certain timeframe, we'll work with you to make things simple and convenient. So what could that look like?

1

Gather your clients' information – we'll let you know what we need.

2

We'll work with you, to support you in uploading your clients' information to the platform and generating application packs for your clients to sign.

3

When your clients have signed the packs (e-signatures are fine), let us know and we'll discuss next steps.

4

We'll get your clients' accounts set up and actively monitor the progress of transfer requests.

5

Throughout the process, we'll work closely with you, and with colleagues across the business, to make sure you're always in the loop with progress.

Sound good? [Get in touch](#) or [visit our website](#) to find out more