M&G wealth

Everything you need to get started on the M&G Wealth Platform.

In this Welcome Pack you'll find information for signing up to the platform and how to get started using the platform day-to-day.

1. Signing up to the platform

Thank you for choosing the M&G Wealth Platform. Before you sign up, please take a moment to review our Due Diligence guide to ensure our platform meets your business and client needs.

When you're ready, it takes just minutes to sign up by completing the relevant M&G Wealth Platform Application:

- Application for firms Directly Authorised by the FCA
- Application for Appointed Representatives from FCA regulated Network (requires network signature)
- Application for a Network registering on the platform

Openwork firms – access to the platform should be requested via the Openwork Head Office. A New Firm Application does not need to be completed.

Additional users

If adding more than one user, just complete an additional Section 2 of the form for each user required.

Important information

Each form will have to be signed by an FCA Approved Person who has SMF14 or SMF16 functions with the authority to commit to contracts on behalf of the Firm.

Completed forms should be sent directly to platforminception@mandg.com, who will also be able to help with any sign up queries.

2. Start using the platform

Platform login

Login to the platform here.

Your username is a unique number sent to you during registration and usually begins with ‘1’. Your password will be what you set up during your initial account activation process.

If this is your first time logging in, you may need to activate your account using the link in your activation email before setting up your login details.

If you have lost any of this information you can contact our Customer Service Team.

Guides and support

Once you are logged into the platform, you’ll have access to the following guides and support materials:

• Setting up a client	• Rebalancing and money allocation
• Adding further assets	• Reporting on the platform
• Creating and editing a model	• Dealing on the platform
• Excluding cash and assets from a rebalance	• Transacting insured funds on the platform

You can also find important information including Terms of Business, fact sheets and client guides on our Key Resources webpage.

Contact us

If you need any assistance with using the platform, such as log in details or application support, please contact our Customer Service Team on 0345 076 6140.

Our lines are open 8:30am to 5:30pm Monday to Friday.
Alternatively, please email us at PlatformSupport@mandg.com

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