



INVESTING VIA ASCENTRIC

GETTING STARTED

The Unicorn AIM IHT & ISA Portfolio Services is available through a number of third-party platforms. This guide shows the step-by-step process to getting started with Ascentric.

Step 1 - Agreement

A discretionary agreement between the Adviser and WM Capital Management is issued for completion. This must be signed by or on behalf of the adviser, scanned and emailed to the Administration Team at WM Capital Management. Upon receipt, the agreement will be countersigned by a member of our team, scanned and emailed back to the adviser for their records.

Step 3 - Investing

The adviser will link the client to the model portfolio and instruct the initial investment. Once the initial investment has been instructed, the portfolio will be managed by WM Capital Management in Accordance with the Investment Agreement. Changes to the portfolio holdings are completed on a discretionary basis.

Step 2 - Authorisation

WM Capital Management will then instruct Ascentric to give the adviser platform access to Unicorn AIM IHT Portfolios.