



# INVESTING VIA STANDARD LIFE

## 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 Transact.

### 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

Client funds can then be added to the portfolio by clicking on create orders within the client's wrap. Select tax wrapper, and then either Buy Trades or Switches. Then click on the grey "find" button, select MPS Portfolios and then WM Capital Management. The Unicorn Portfolios can then be added.

### Step 2 - Authorisation

WM Capital Management will then add the adviser to the list of authorised IFAs for the Standard Life portfolio.

### Step 4 - Management

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.