FINANCIAL ADVISORY LAUNCH PROGRAMME · SET UP PLATFORMS AND RESEARCH TOOLS

Platform and research setup checklist

Shortlist criteria, agency-code setup steps, and a network-panel alignment check.

01 Shortlist criteria

Pick one or a small number of platforms deliberately, not by habit.

Which platforms fit your niche and the investments you will recommend?

How do their charges compare, and who bears them?

02 Agency-code setup

You cannot transact until the agency and onboarding are done, so start early.

Have you completed onboarding and obtained agency codes for each platform?

Have you set up your research tools (for example FE fundinfo, Defaqto)?

03 Network-panel alignment

For an Appointed Representative, the panel may define or constrain the choice.

Does your network operate a platform panel, and does your shortlist align with it?

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Want your platform data flowing into a client portal? Talk to us about the build.

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Talk to us