

SchrodersLink Client Activation Form

- 1. **Client Name:** _____
- 2. **Portfolio(s):** _____

The nominated **SchrodersLink Authorised Administrator** (inserted in the table below) will be the Client representative in relation to SchrodersLink. The Authorised Administrator will be authorised to request changes to the list of named Client Users.

Administrator Name:		
Job Function/Title:		
Phone:		
Email Address:		
Address:		
Signature of Authorised Administrator:		Date:

3. **Other Client Users:**

Name:	
Job Function/Title:	
Phone:	
Email Address:	
Address:	

Name	
Job Function/Title:	
Phone:	
Email Address:	
Address:	

4. Consultant Access

Please insert details of the Consultants you wish to have access to SchrodersLink below:

Consultant Company Name*	
Address	
Phone	

*By providing the Consultant company name you authorise Schroders to give access to any employee of that company upon their request from time to time.

Individual Consultant User Name:	
Job Function/Title:	
Phone:	
Email Address:	
Address:	

Individual Consultant User Name:	
Job Function/Title:	
Phone:	
Email Address:	
Address:	

I acknowledge that I have read, understood and by signing below agree to be bound by the terms of the attached important notes, guidance notes and [SchrodersLink Terms & Conditions](#).

Authorised Signatory:**.....

Print Name:

Date:.....

**Under the terms of your Legal Agreement with Schroder

SchrodersLink Guidance Notes

- (a) Confirm your Client Name and the name of the Portfolio(s) that we manage for you.
- (b) Fill in the name and details for your Authorised Administrator in relation to SchrodersLink, who will be your representative and Authorised Signatory in respect of SchrodersLink. The Authorised Administrator will be authorised to instruct us regarding changes to the list of Client Users (as defined in subparagraph (c) below).
- (c) Fill in the names and details for your other nominated users. Each such user, including the Authorised Administrator, is referred to as a “Client User”.
If you wish to nominate a consultant as a user, the consultant’s details should be inserted in the section for Consultant Users.
- (d) Sign the User Activation Form. (Please note, the Form must be signed by an **Authorised Signatory** – as recognised in our Agreement with you, or as you may have otherwise notified Schroders in writing). Your attention is drawn to the important notes at the bottom of this page.
- (e) Return the completed User Activation Form to your Client Executive or Client Director.
Once we receive the completed and signed User Activation Form, we will contact the Client Users directly informing them of their user names. Each Client User will be informed of how to obtain their individual password by their Client Executive.

***IMPORTANT NOTES:** The Authorised Signatory must be an authorised signatory under the terms of our Investment Management Agreement with you, or as you may have otherwise notified Schroders in writing. By signing this Activation Form you represent that (i) you authorise us to provide to the individuals specified in the tables attached access to the SchrodersLink service and the information that it contains on your portfolios, (ii) you will notify us of any changes to the personnel authorised to view this information, (iii) you understand that while every effort is made to minimise risk, the internet and e-mail cannot be guaranteed as secure forms of communication, and (iv) you have read and agree to the SchrodersLink “Terms & Conditions” which are available online from the following link: [SchrodersLink Terms & Conditions](#).

You are responsible for any and all use of the SchrodersLink service using the user names issued to you and for protecting and securing your user names and passwords from unauthorised use. If there is any reason to believe that there has been unauthorised access to your user names or passwords, you should notify Schroders immediately.

Any personal data provided to Schroders for the purposes of administering your SchrodersLink account may be visible to other persons you authorise to access your SchrodersLink account. Therefore, you acknowledge that it is your responsibility to ensure that those persons authorised to access your SchrodersLink account understand the obligations on them to keep your personal data confidential and not to disclose such information to any third party.