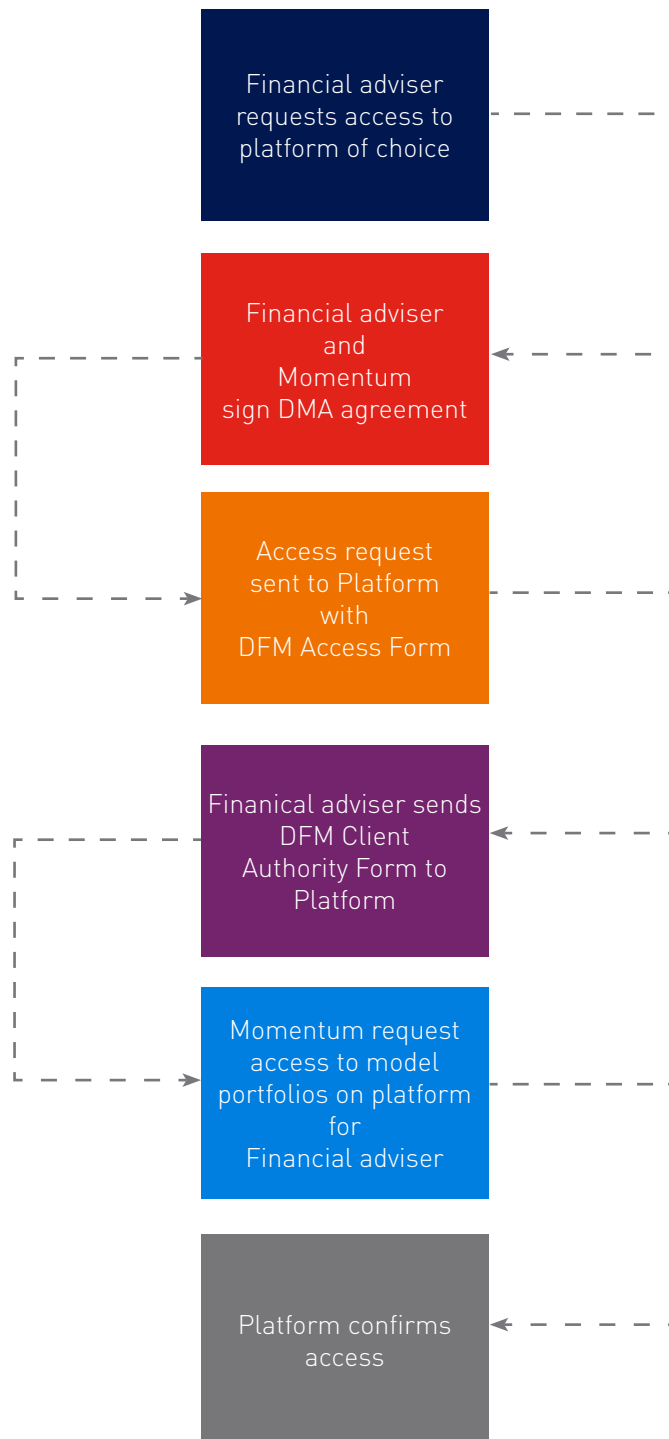


# Platform process

The following process is applies to the **Aviva platform**.



The following process applies to the Aviva Platform



**Momentum Requirements;**

The financial adviser needs to sign the Discretionary Management Agreement (DMA) and return this to Momentum, this can be either;

- a scanned document sent by email to [advisersolutions@momentum.co.uk](mailto:advisersolutions@momentum.co.uk)
- a fax sent to +44 (0)20 7480 0730 or
- posted to Momentum, The Rex Building, 62 Queen Street, London, EC4R 1EB

Once the DMA has been received by Momentum it is sent to Aviva, when Aviva receive the DMA they grant the financial adviser access to Momentum's model portfolios.

**Process for new Business;**

The financial adviser submits an online application together with any further required documents including the DFM agreement form which needs to be signed by the client.

**Process for investing into Momentum's Portfolios;**

Once the new business requirements have been completed investments can be made directly into the portfolios.

**Platform Cash Requirement;**

There is no cash requirement, Aviva dis-invests to cover any charges on the platform.

**Does Aviva Pre-Fund Switching?**

Yes

**Does Aviva Pre-Fund when rebalancing?**

Yes

**Does Aviva Pre-Fund income payments?**

No, Aviva dis-invests in line with the Model Portfolios to ensure income is paid on the requested date.