**Client On-boarding Configuration Form**

Please complete this form for every client that is to be on-boarded to the Affordability Passport platform.

**Company Name**

|  |
| --- |
|  |

**Department Name(s) required**

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| --- |
|  |

**Company Address**

|  |
| --- |
|  |

**FCA Registration Number**

|  |
| --- |
|  |

**Companies House Number**

|  |
| --- |
|  |

**Data Protection Register Number**

|  |
| --- |
|  |

**VAT Number**

|  |
| --- |
|  |

**Contact Information**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
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| --- | --- | --- |
| **Main Contact:** | **Billing Contact:** | **Downtime/ Technical Contact** |
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**Affordability Passport Services Required (Please Tick Below)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|

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| --- |
| **Standalone via Passport** |
| * AML (Anti Money Laundering)
 | * Open Banking
 |
| * ID Verification (Onfido)
 | * Credit Report
 |

\* **Note: ID Verification & Open Banking will still require the customer to interact with the Affordability Passport front-end but all supporting functions (such as customer onboarding is done through API calls.)**  |

**Adviser Email Addresses** (If requesting more than one Department, please specify advisor/department)

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**Company Logo**

|  |
| --- |
|  |

**Requested by**

|  |  |
| --- | --- |
| Name & Signature  | Date |

**Actioned by Experian**

|  |  |
| --- | --- |
| Name & Signature | Date |

**Completed by Experian**

|  |  |
| --- | --- |
| Name & Signature | Date |