**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**

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|  |

**Department Name(s) required**

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**Company Address**

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| --- |
|  |

**FCA Registration Number**

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| --- |
|  |

**Companies House Number**

|  |
| --- |
|  |

**Data Protection Register Number**

|  |
| --- |
|  |

**VAT Number**

|  |
| --- |
|  |

**Contact Information**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  | | --- | --- | --- | | **Main Contact:** | **Billing Contact:** | **Downtime/ Technical Contact** | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |

**Affordability Passport Services Required (Please Tick Below)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| |  | | --- | | **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**

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|  |

**Requested by**

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

**Actioned by Experian**

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

**Completed by Experian**

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