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How To Apply For An Entity Account

How To Apply For An Entity Account

Learn how to apply for an entity account with Swyftx.

Written by Swyftx
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Before you start

- The entity application will use your current Swyftx account. You don't need to make a new account for this process.
- If someone in your entity doesn't have a verified Swyftx account yet, we will send them an email with instructions on what to do. Applications will only progress once all parties are [verified users](#) on Swyftx.
- Check the requirements and which documents you need for your entity application:
    - [Set up an SMSF with Swyftx](#)
    - [Set up a Trust with Swyftx](#)
    - [Set up a Company Account with Swyftx](#)
- Read more about [trust and company](#) or [SMSF](#) accounts.

Apply for an entity account

App

1. From the **Menu**, select **Switch account** from below your name**.**
2. Select **Create entity account**.
3. Select **Continue,** then **Continue** on **Create entity** to start your application**.**
4. Enter your details in the **Step-by-Step Entity Account Creation Form**.

Web

1. Click on your initials in the top menu bar, then select **Switch account**.
2. Select **Create entity account**.
3. Select **I understand, continue**, then **Continue** to start your application.
4. Enter your details in the **Step-by-Step Entity Account Creation Form**.

What happens next?

- After completing the form, our team will review it and contact you if we need more information.
- All parties will receive an invitation by email to join the entity account. You can let others included in the application know to expect an email from us. The application will only progress when all members have accepted the email invitation and all accounts are [verified users](#) on Swyftx.
- We will send you a message when the account is ready to go!

Further questions?

If you have any further questions, get in touch with us via live chat.

Did this answer your question?

😔   😐   😃

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