Staff login>

This is accessible to user with admin rights only.



1. Add New Client 2. Edit Client

Accessible to all Users

3. Upload Documents

1. Add New Client

First Name of UBO/Controller

John

Country of Residence

Choose Country



Last Name of UBO/Controller

Doe

- Trust
- Authorised Company
- GBC (no special Licence)
- GBC with Special Licence
- PTC
- Limited Partnership (non-fund)
- Limited Partnership (CEF)
- PCC (non-fund)
- PCC (CIS/CEF)
- VCC Fund
- Investment Fund (CIS/CEF)

Name of Associated Entity(ies)

1. JD Trust

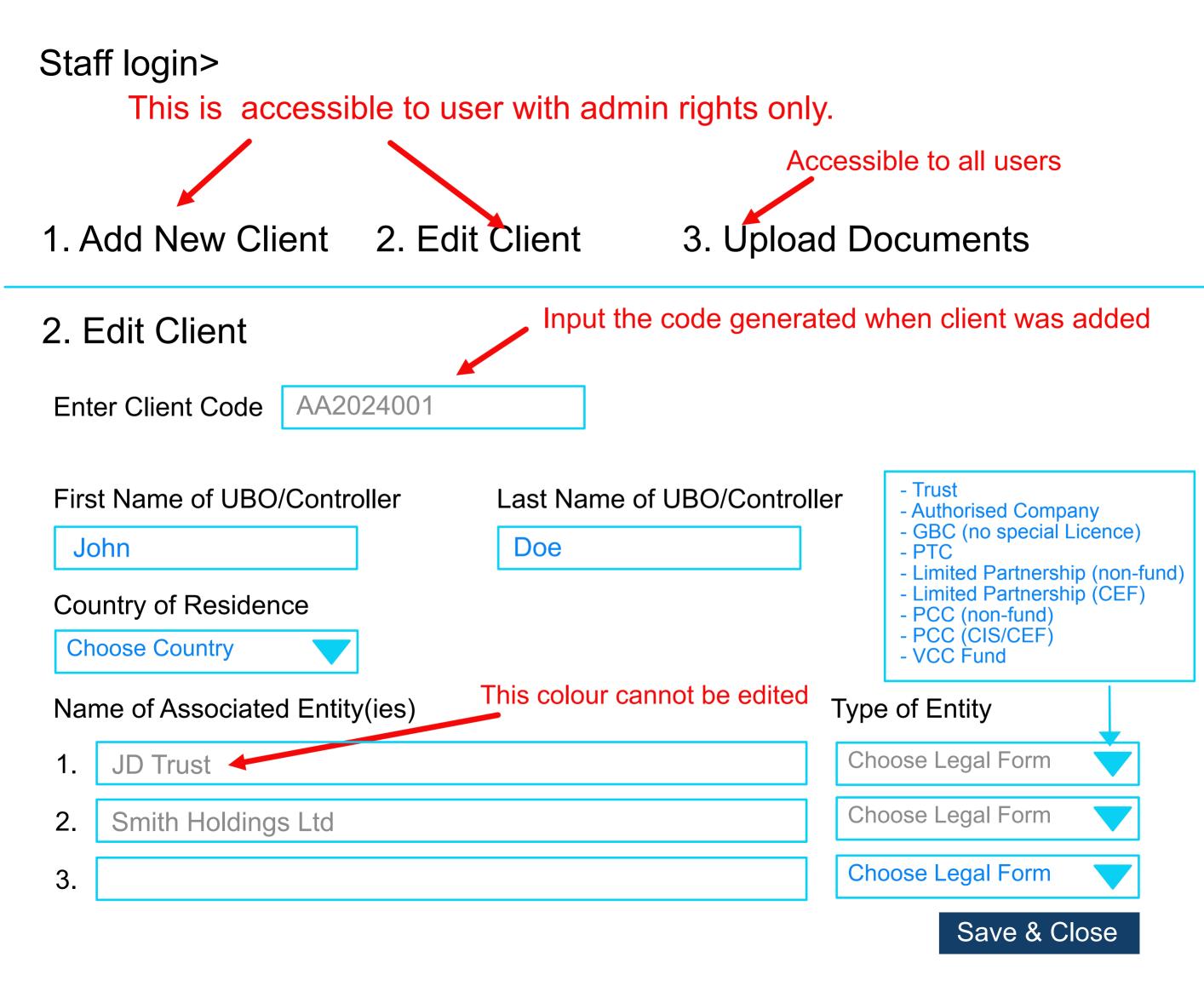
2. Smith Holdings Ltd

Type of Entity

Choose Legal Form







Staff login>

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- Add New Client 2. Edit Client
- 3. Upload Documents

Accessible to all users

Exit

Input the code generated when client was added 3. Upload Documents Client Code Date of Document Category Document **Upload** AA2024001 25/07/2024 Resolution CoSec **Upload** 20/07/2024 Billing AA2024002 **Invoice Upload** 25/07/2024 Invoice AA2024001 Billing **Upload** 22/07/2024 Shareholder Agreement AA2024012 CoSec Upload **Choose Category Upload Choose Category** - CoSec - Billing - Accounting - Corporate

- Fund Administration

- Fiduciary

- Taxation

- Compliance