

How to submit an application form?

Step 1

Provide the relevant details about your adviser firm in Section 1 of the online form. Questions with an asterisk indicate a required field.

Step 2

In Section 2 complete the details about the application form you are submitting and the email address of the customer it is being submitted on behalf of. Upload the application form in the highlighted area of the form shown below.

2. Details of application

What type of plan does the application/instruction form relate to? *

-- Select an option --

Client's email address *

Upload client application form *
The maximum file size is 10MB

Choose a file...

Application reference
This reference will be quoted in an acknowledgement email when you submit the application

Upload accompanying documentation
You can select more than one file at the same time. You can upload a maximum of 10MB at once, regardless of the number of files

Choose a file...

Step 3

If you are submitting an unsigned application form in Step 2 then you will need to upload the confirmation email from the customer in the 'accompanying documentation' section of the form as shown.

Application reference
This reference will be quoted in an acknowledgement email when you submit the application

Upload accompanying documentation
You can select more than one file at the same time. You can upload a maximum of 10MB at once, regardless of the number of files

Comments/instructions

3. Declaration

I confirm that:

- I am authorised by my client to submit this application and supporting documentation to you via this medium on their behalf and

The unsigned application form must be an attachment in the email that you upload and the legal wording that we have provided must also be in the email from the customer. Here's an example of what the email that is uploaded should look like:

Unsigned application form is an attachment in the email from the customer

Specified Legal wording used

From: customer email@example.co.uk
To: adviser email@example.co.uk
Subject: Pension Portfolio Application Form

Message: PP Application Form.pdf (740 KB)

Please accept this email as my application to Royal London on the terms specified in the attached application form and, in particular, representing my declaration of the statements made in the Declaration section.

I confirm that I have asked you, my financial adviser, to submit this application form together with this email to Royal London on my behalf.

I agree that this email is my electronic signature of the attached application form (and any direct debit instruction) as at the date of this email and that this email reflects my intention to be bound by this application as if signed by my handwritten signature.

Regards,
Joe Bloggs

To be able to upload the email to the portal you will need to first save the email to your desktop. This can normally done by selecting 'Save as' from the 'File' menu or by right clicking the mouse when the email has been selected in your inbox. This may vary for different email systems.

Step 4

Read the declaration section and then tick the relevant box if you agree to the terms. Confirm that you are not a robot and then submit the application to us by clicking on the 'Submit' button at the bottom of the form.


3. Declaration

I confirm that:

- I am authorised by my client to submit this application and supporting documentation to you, via this medium, on their behalf; and
- in submitting this application, I have complied with my obligations under Royal London's [terms of business \[PDF - 0.6MB\]](#) and agree to be bound by the same in respect of this application.

I agree *

Recaptcha *

I'm not a robot  reCAPTCHA
Privacy - Terms

* Indicates a required field

Submit →