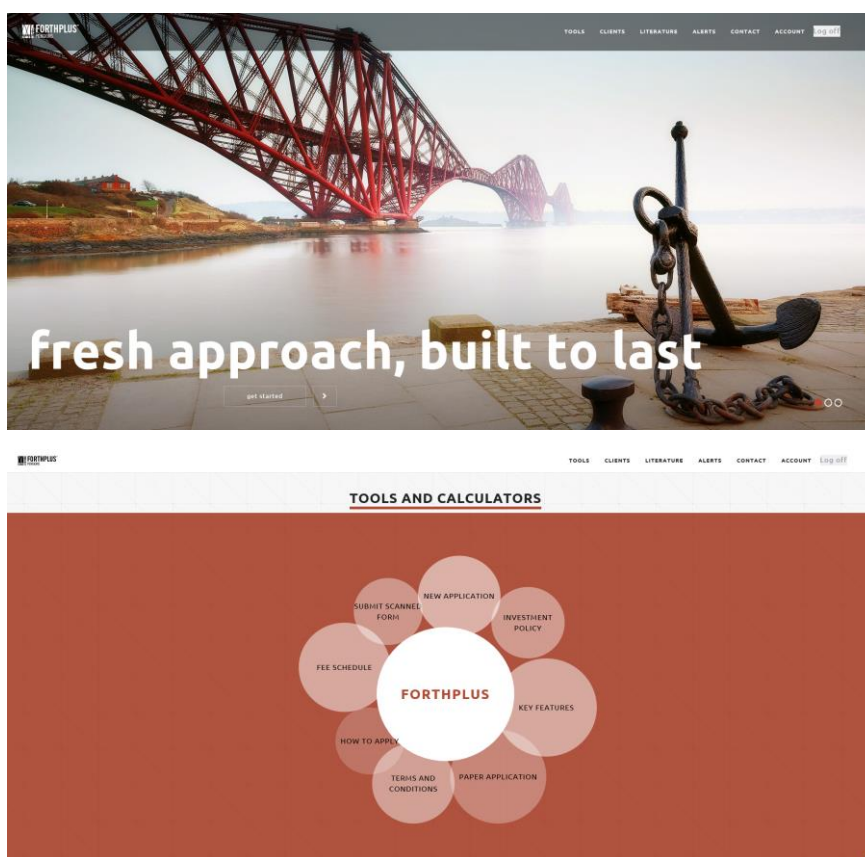


Designed to be as concise and simple as possible, to complete an online application simply follow the process laid out below:

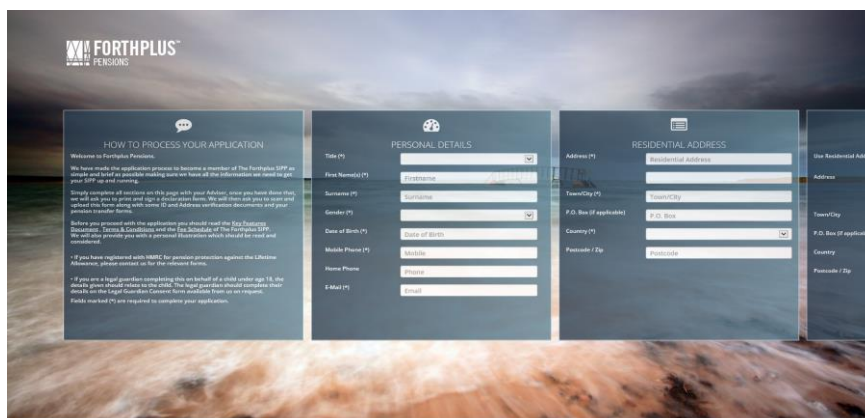
Firstly, you need to log into the Forthplus Portal, a secure area where you can apply, monitor and manage pension policies on behalf of your members. Simply go to www.forthpluspensions.com

Click the “LOGIN” button then enter your unique login username and password on the next screen.

Click the “get started” button or scroll down to Tools and Calculators.

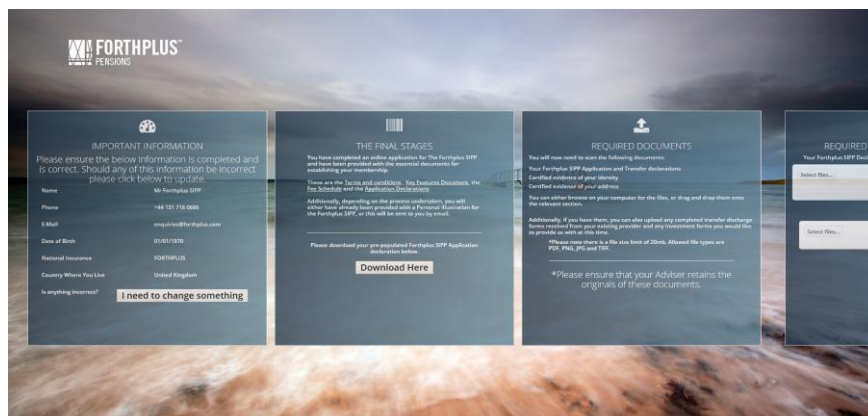


Click on “NEW APPLICATION” which opens the self-explanatory application boxes.



All the questions are on one page in a logical sequence. Simply complete each box with your client's information. If you have to stop at any point, don't worry, as the system automatically saves each box as you move through the application. You can then restart from your ongoing applications section on the opening page.

Once you have completed the application boxes you click on the “Proceed with Application button which opens the Final Stages; the confirmation and upload sections of the process:



In this area you will be given the opportunity to confirm that the essential information you entered is correct.

If you are satisfied that the information is right then you can download the simple, 1-page declaration form for your client and yourself to sign. If there are any current pensions to transfer, then the Pension Transfer Request forms will be downloaded at the same time for the client’s signature.

Next is the upload area where you should upload the required documentation once you have scanned them. These are:

- Your client’s Application and Transfer declarations.
- Certified evidence of your client’s identity and address.

Additionally, if you have them, you can also upload any completed transfer discharge forms received from your client’s existing provider and any investment forms you would like to provide us with at this time.

That’s all there is to it!

**Should you require more in-depth, step by step, information on the process and our required documentation you can download our “How to Apply Online” pdf in the literature section on your opening page after logging in.*