

How to quote on behalf of a financial adviser



Step 1:

Log on to QuotaM web using the direct URL (not through VIA)

Myriad Quote

Momentum Life

Login

Username

1



Password

2

Login

3

1. Complete the *Username*.
2. Complete the *Password*.
3. Click on 'Login'.

How to quote on behalf of a financial adviser



Step 2:
Choose Financial
Adviser

Welcome to Myriad

Please click on the button "Choose financial adviser" to start working on behalf of a financial adviser.

1

[Choose financial adviser](#)

1. Click on 'Choose financial adviser'.

How to quote on behalf of a financial adviser

Step 3:
Complete the
financial adviser
details

Switch Financial Adviser

Complete the financial adviser detail below and click the submit button to switch to a different financial adviser.

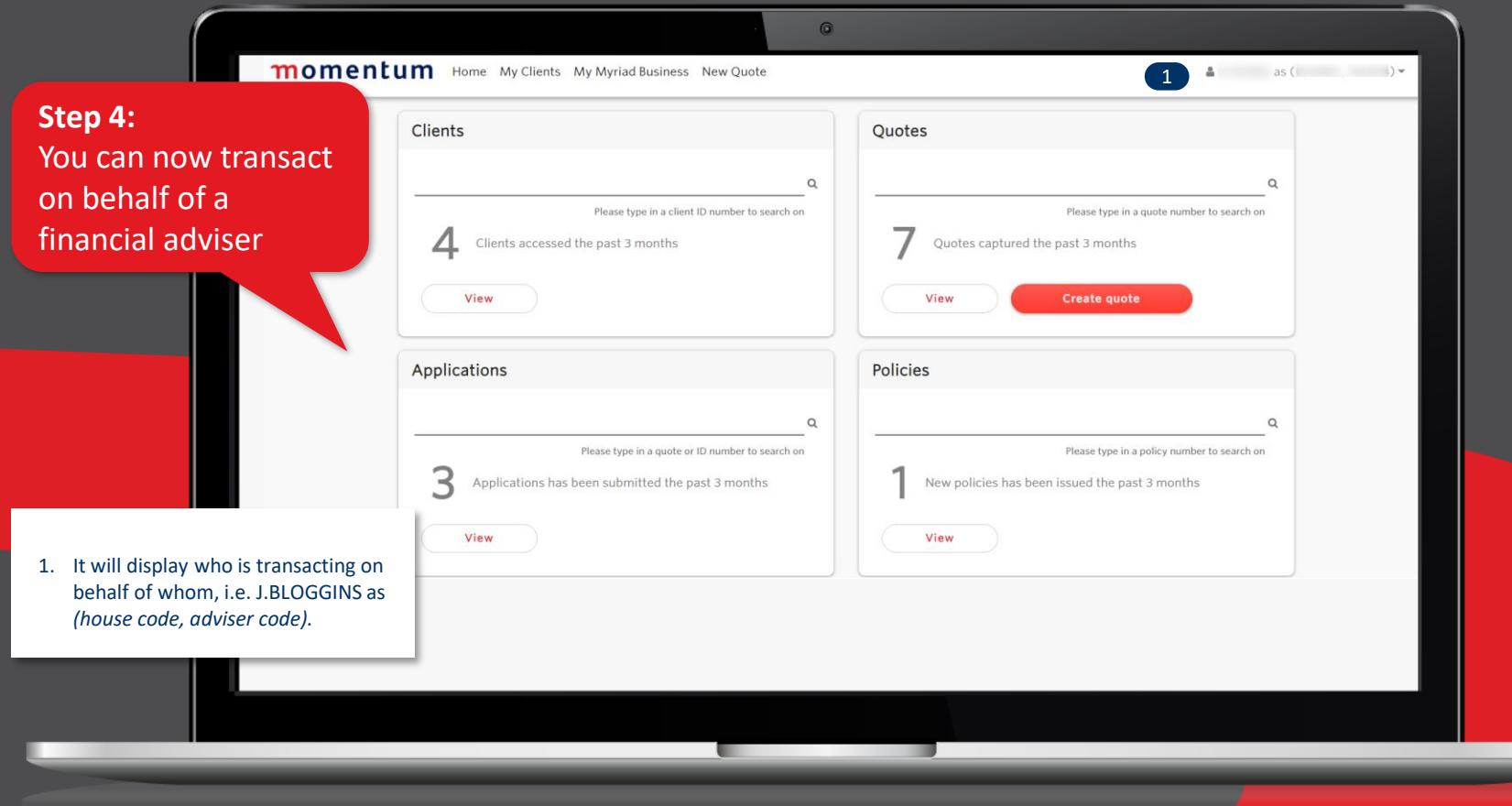
Broker house code 1

Financial adviser code 2

3

1. Capture the *Broker house code*.
2. Capture the *Financial adviser code*.
3. Click on 'Switch'.

How to quote on behalf of a financial adviser



Step 4:
You can now transact
on behalf of a
financial adviser

1. It will display who is transacting on
behalf of whom, i.e. J.BLOGGINS as
(house code, adviser code).