

How to quote on behalf of a financial adviser



Step 1:

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

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

Myriad Quote

Momentum Life

Login

Username

1

Password

2

3
Login

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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.

Choose financial adviser

1

1. Click on 'Choose financial adviser'.

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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

Cancel

Switch

3

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

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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).

