The smart investment platform

novia global europe

How to top up an existing account

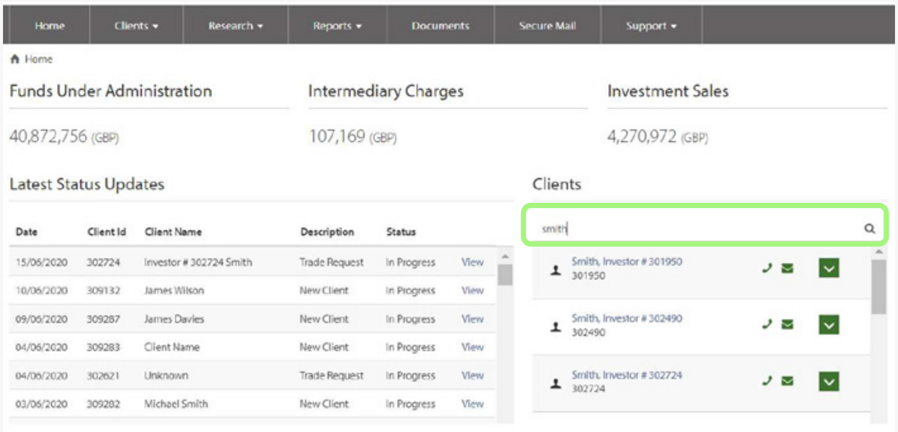
User Guide

Overview

Processing a top up payment for an existing client is a straightforward process comprised of the following steps.

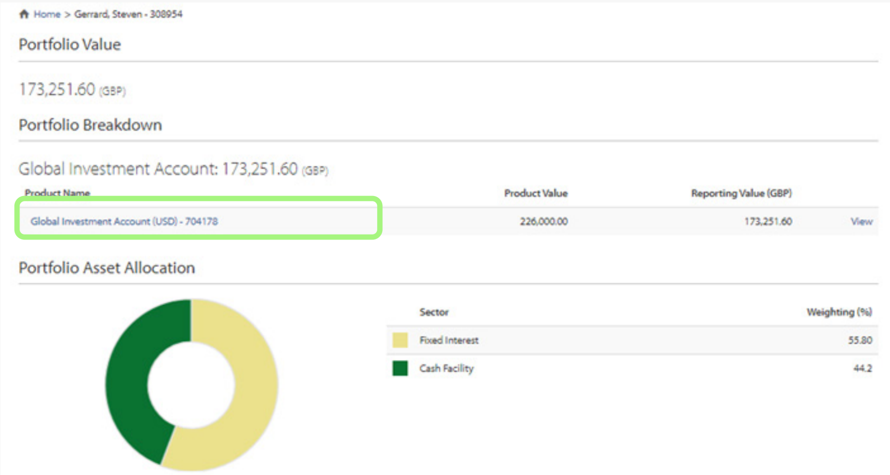
Submit the online Top Up application	1. Select the Client. 2. Select the appropriate product. 3. Select Top Up from the options along of the screen.
Save or print the Payment Instruction	• The pre-populated Payment Instruction form will generate at the end of the application with all the information required for the client to make the payment. • The Payment Instruction form will automatically upload to the Document folder as well.
Client sends the payment to Novia Global Europe Limited	• Client arranges for the payment to be sent to the details on the Payment Instruction. • On receipt of the payment, Novia Global Europe Limited matches the money with the online expectation. The Cash Receipt Confirmation is uploaded to the Documents folder online; this notifies the adviser that the cash has been received.
Submit online Trade Instruction	• The newly applied money will sit in the client’s cash facility until the adviser places a trade instruction. • Adviser logs into the web and submits a Buy Instruction to trade the new money into the required assets or model portfolio.

Processing a “top up” payment



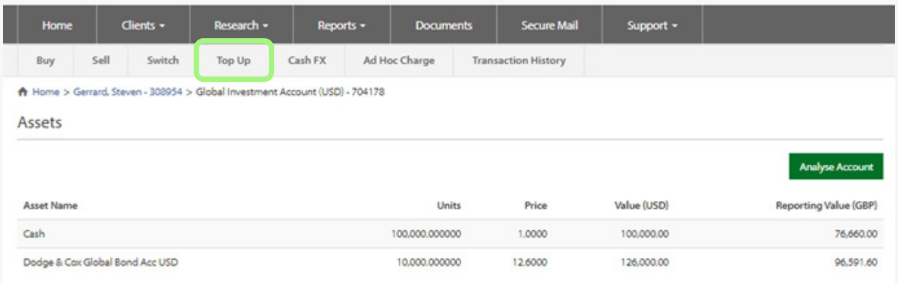
Step 1

After initially logging into the platform, search for the required client.



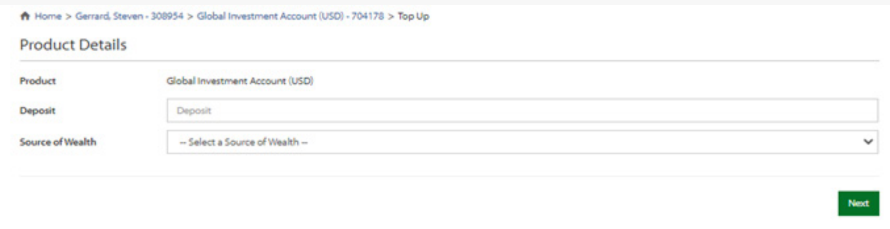
Step 2

Select the required product.



Step 3

Select “Top Up” from the process menu.

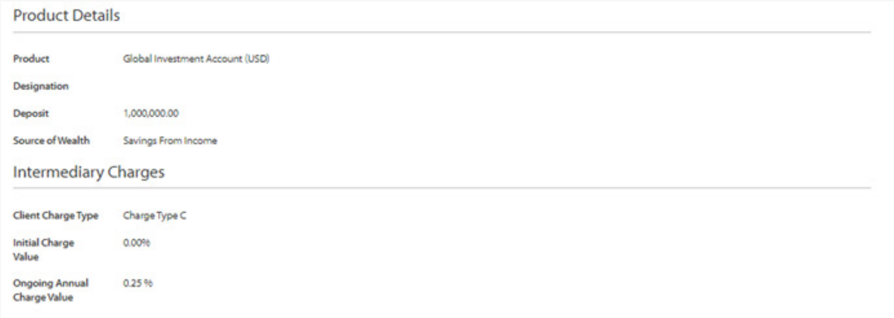


Step 4

Enter the appropriate top up amount and source of wealth.

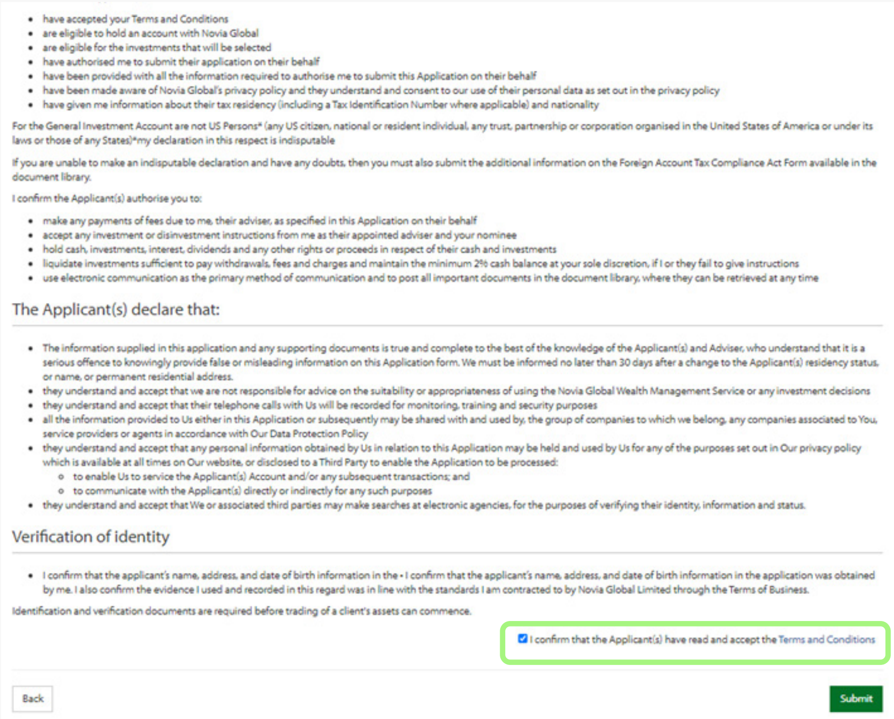
Step 5

Enter the initial and/or ongoing adviser fee charge.



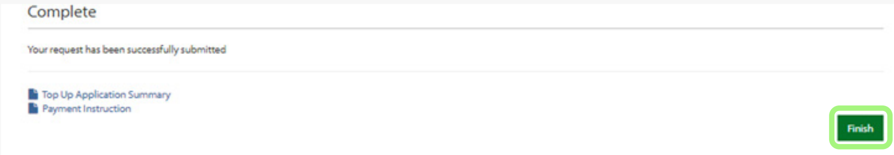
Step 6

After clicking "next" a summary is shown of the top up details you have entered.



Step 7

Tick to confirm application details are correct and accept declaration.



Step 8

After submitting the case, the relevant documents are generated. These documents can be opened and printed.

After reviewing the documents, click "finish" to complete the process. You will then be returned to the homepage with the new client information now being displayed.