Firm Name	Individuals Name	User Access Levels	Mobile Number	Email Address

Key Notes

Please note a mobile phone number is required for two factor authorisation

User Access Levels

We have 4 levels of user access

1. Advisor Access - An individual will have access to all clients assigned to them by BCP
2. Branch Accecss - An individual will have access to all clients assigned to a specific branch of your firm
3. Agency Access - An individual will have access to all clients assigned to your agency
4. Access Financial Data - View all agency commission statements online