

# HOW TO OBTAIN YOUR OLD MUTUAL WEALTH NETWORK OR FIRM ID



The following instructions show you how to find your 'Network ID' or 'Firm ID' that you may need to configure your adviser back office software.

- Log into the new Old Mutual Wealth technology platform
- Click into 'Reporting' on the top right of the screen

If you belong to a **directly authorised firm**:

- Select the following options from the drop-down menus:
  - Report type: Clients by Adviser
  - Company: All
  - Adviser: All
- Click '**GENERATE REPORT**'
- The requested report will appear under 'Report' at the bottom of the page, and your Network ID will be shown next to it, under the 'Criteria' heading. Your Network ID will be in the format PLNWxxxxx.

Report	Criteria	Request time	Status
Clients by Adviser	As at 08-Oct-2020, Company All, Network PLNWxxxxx, Adviser All	08-Oct-20 12:03 pm	Complete

If you belong to an **appointed representative firm**:

- Click the 'Company' drop-down and you'll see your Old Mutual Wealth Firm ID ahead of your company name. Your Firm ID will be in the format PLARxxxxx.

Report	Criteria	Request time	Status
Adviser Regular Initial Fee Report	PLARxxxxx - Old Mutual Wealth Management Limited, Adviser All		

[www.oldmutualwealth.co.uk](http://www.oldmutualwealth.co.uk)

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Old Mutual Wealth is the trading name of Old Mutual Wealth Limited which provides an Individual Savings Account (ISA) and Collective Investment Account (CIA) and Old Mutual Wealth Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

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PDF21043/220-1748/November 2020