TITAN Wealth Alternatives

Application Process Guide

Triple Point
Estate Planning Service

Application

Advisers can download the form for or request via contact@triplepoint.co.uk

This can be completed and signed via either wet signature or DocuSign.
A copy of the completed application can then be emailed to our Operations team on applications@triplepoint.co.uk or the hard copy application posted by special delivery to Triple Point at 1 King William Street, London, EC4N 7AF.

Verification

Once the Adviser submits the application, the adviser will receive a receipt of application email, and the Investor will receive an acknowledgement email.

*In some circumstances, Triple Point may require additional information, if so, Triple Point will contact the Adviser directly.

Payment

Payment details are in the application form can be found within section 7 within the application form.

Once funds are received, Triple Point will send a 'Funds received' confirmation email to both the Adviser and Investor. If the funds and application are received together, only one acknowledgement email is sent but will confirm receipt of application and funds.

Allotment

Following allotment of funds, the Investor is issued with a Welcome Letter which will confirm the date of allotment details and the date the two year qualification period for Business Relief will start.

Portal

Following the allotment of shares Triple Point offers an Investor online portal for individual holdings and further information on this is included within the Welcome Letter that is sent post-allotment.

Once registered, clients can view transaction details and their investment value.

Advisers can access information on the Triple Point Adviser Portal. This can be accessed here: https://portal.triplepoint.co.uk/s/login/

Get in Touch

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