



Alternatives

A series of thick, purple, wavy lines that curve upwards from the bottom left towards the top right, creating a sense of movement and depth. The lines are layered, with some appearing in front of others.

Application Process Guide

Puma Heritage Estate
Planning Service



Application

Advisers can download the application form from the Adviser Centre.

The form can be completed and signed using either a wet-ink signature or DocuSign. A copy of the completed form can then be emailed to the Client Onboarding team at clientonboarding@pumainvestments.co.uk.



Verification

Once the Adviser submits the application form, AML checks are carried out, and any missing information will be requested by email from the Adviser. Once completed both the Adviser and the Investor(s) will receive a confirmation letter, along with the bank transfer details and the bespoke payment reference.



Payment

Once the application funds have been received, confirmation is issued to both the Adviser and the Investor(s). If no information is outstanding, Puma will then email the Adviser to confirm that the funds are ready to be allotted.



Allotment

Puma Heritage EPS allotments take place twice weekly on Tuesdays and Fridays, excluding the first Tuesday of each month.

Following the allotment of funds, a confirmation letter is issued to both the Adviser and Investor(s).



Portal

Puma will issue portal registration details to the Adviser, and to the Investor(s) where electronic correspondence has been selected.

The portal provides a centralised location where both Advisers and Investors can view full investment details and access all related documentation, including transaction reports and valuation statements.

Get in Touch

Client Services

clientrelations@pumainvestments.co.uk

Client Onboarding

clientonboarding@pumainvestments.co.uk

Business Development

businessdevelopment@pumainvestments.co.uk

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