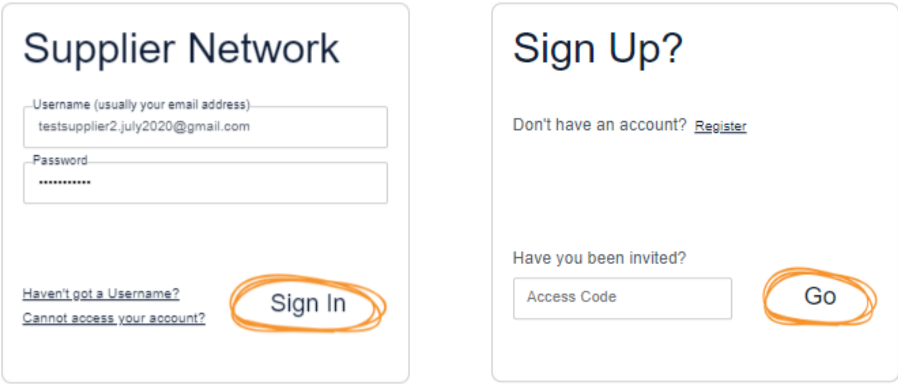
<u>Guidance for completion of the invitation to engage:</u>

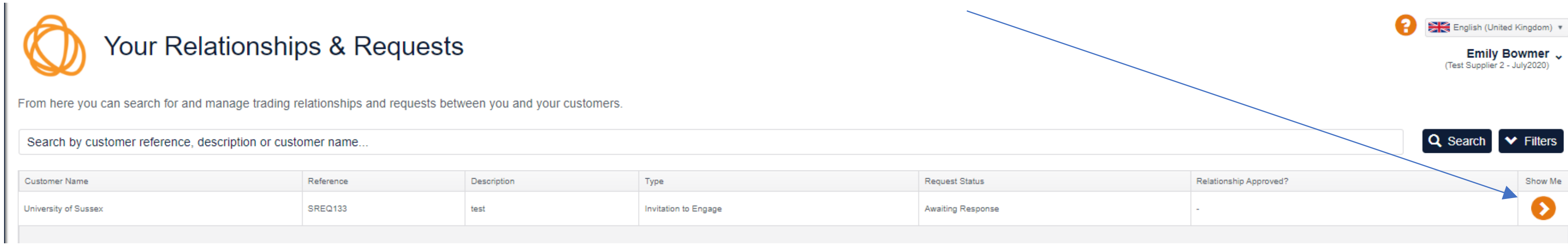
1. Click the link provided from the email with a subject heading “Invitation to Engage”

2. Create an account, or log in to an existing account

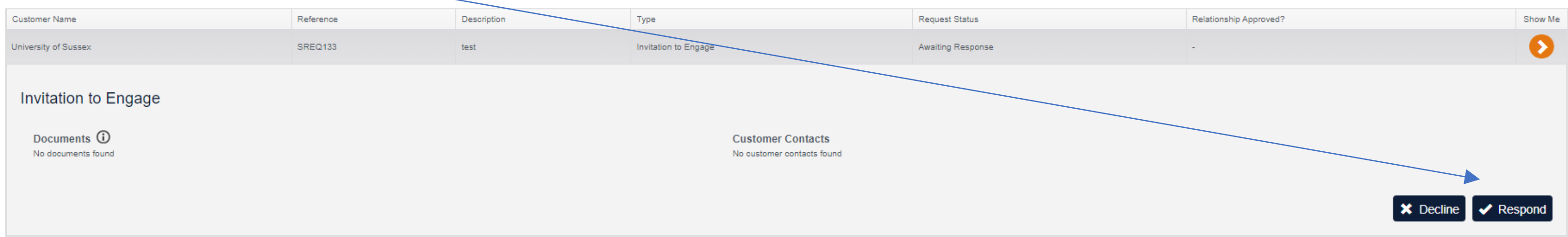


3. Select “Customer Requests”

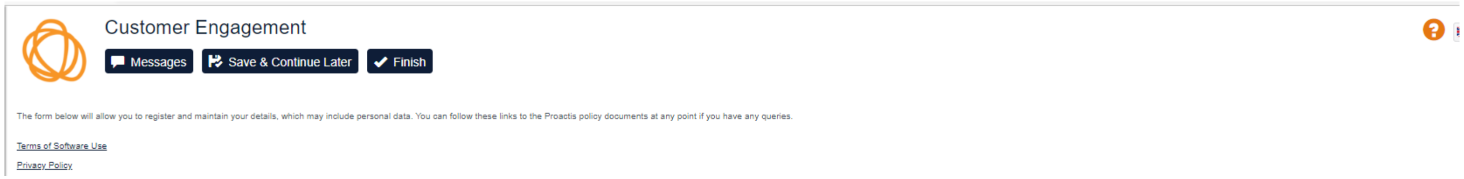
4. Under “Your Relationships & Requests” you will see an Invitation to Engage - select “Show Me”



5. Then click “respond”



6. This will open the “Customer Engagement” screen.



7. Please update the questions in each of the following sections: Each section must show as **Complete.** Your bank details must be updated in the additonal information tab and will be verified against the copy you provide in the documents tab.

8. Under the documents tab, you need to upload a copy of your bank details; you will need to see a tick in both the Mandatory and Uploaded column to complete this section. This is the only mandatory document required.

View & Upload Documents			
Document Name	Document Type	Mandatory	Uploaded
Bank detail upload document	Bank Details	✔	✔

9. The bank details tab is under "Additional Information", this is where you need to amend the information already provided:

Bank Sort Code (UK) or Routing Number: (DO NOT ENTER SPACES OR HYPHENS)

IL[redacted]37

Bank Account Number:

1[redacted]/96

IBAN Number (For NON UK accounts only - No Spaces please):

il97[redacted]96

10. Once all sections show as complete, you can click "Finish" – at the top or bottom of the page.
    This will submit your responses and we will receive an email notification to confirm this.