

FOR REFERRING BROKERS

The Bridge — a walkthrough

The service record for the clients you introduced, and the boundary around it.

Clients

/bridge — The service record for the clients you referred: what is outstanding, who holds it, what was settled. Each client is shown on its own terms. Separate introductions are not a portfolio and are not totalled.

How it works

/bridge/how-it-works — The boundary — what you see, what you do not, and where the advice relationship sits. This is the page to forward to a compliance team.