



# B4FINANCE

## B4 Appointed Representative

B4 Appointed Representative enables principals to streamline AR onboarding, stay compliant, and upgrade services to their Appointed Representative.

### FOR YOUR PRACTICE

#### ✓ Know your AR

Perform all the regulatory checks before onboarding your AR

#### ✓ Maintain oversight

Make sure your AR treats customers fairly by keeping a full audit trail so that you can demonstrate your fairness to third parties, such as the FCA

#### ✓ Extend your services

Connect your AR to an end-to-end solution that streamlines their compliance processes and enables you to collaborate securely with them.

### FOR YOUR AR

#### ✓ Client onboarding

Your AR can perform all KYC& AML checks along with client classification and risk assessments.

#### ✓ Custom brand identity

Offer a white-label solution to you AR. Custom emails, interfaces, and dashboards to match their brand.

#### ✓ Enhance client experience

Turn the time-consuming onboarding and account opening process into an easy-to-navigate digital experience.

## Meet With Us!

The B4Finance team will attend the APCC event on the 4th of May. We look forward to discussing how our integrated solution can scale up your business!



Get In Touch To Learn More About How B4Finance Can Help Your Clients.



9 Devonshire Square,  
London EC2M 4YD



chloe.sabani@b4finance.com



0788 86 38 06