

Who can be a delegate?

Financial Professionals

Financial professionals can designate office and administrative staff to have access to client information, sales materials, and other online services to support their practice. The delegation function allows the chosen delegate to set up and access the website through their own, separate set of credentials. Financial professionals can add and remove delegates from accessing their book of business at any time, and they can add multiple delegates if they choose. Currently, financial professionals cannot designate access to another financial professional.