

Can a delegate act for more than one financial professional?

Financial Professionals

Delegates can support more than one financial professional using the same online account. Once a delegate has been established for one financial professional, other financial professionals can designate the same person to act as a delegate for their practice too.

- Financial professionals will enter the delegate's email address used by other financial professionals
- Delegates will not need to register for each financial professional
- Delegates can switch between rep profiles to support multiple books of business