

# New Account

**Appendix -  
Cloning**

The specialist digital  
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Fiduciary, Corporate,  
and Fund Services.

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**EWG have listened to Clients and requests for a feature to allow them to re-use application form data, rather than having to re-enter information on subsequent forms. In response EWG have released a series of new features. The first being New Account form Cloning!**

Using the Clone feature in the New Account section of the App will allow you to do just that, Clone an existing application form and its form data, giving you a major time saving on data entry and also reducing the risk of errors. The short guide below will take you through the relevant steps.



## / How to use the Clone Feature

To clone a new account form, click on the 'Open New Account' item on the main menu.

Scroll down the Accounts page to the submission you wish to clone, or you can search if there is a long list. When you have found the record, you wish to base your new Account on, click 'Clone'. You can clone both submitted and draft forms.

SEARCH ACCOUNT SUBMISSION					
<input type="text" value="Search account submission..."/>					
ACCOUNT NAME	CREATED AT	STATUS	EDIT	CLONE	DELETE
Jersey Corporate No 2	15 Apr, 2024 10:01 AM	Draft	<a href="#">Edit</a>	<a href="#">Clone</a>	<a href="#">Delete</a>
Jersey Corporate No 1	12 Apr, 2024 2:08 PM	Submitted	<a href="#">View</a>	<a href="#">Clone</a>	<a href="#">Delete</a>

You will be presented with the clone form, shown below. Review the information and enter the name that you wish to use for the new account.

**Please note that account cloning copies ALL text information that was in the original form. It does NOT include any documents. This is to ensure that accurate and current documents are provided.**

**Clone Form**

A new version of the form will be made, keeping all the information from the original application, with the exception of file attachments.

You will need to provide files again in the following situations:

- The original account was rejected
- The files are no longer accurate or current (e.g. Passport has been replaced/expired, Proof of Address is older than 3 months)

NEW ACCOUNT NAME

The account name in the original application: **Jersey Corporate No 1**

[Cancel](#) [Clone](#)

**Clone Form**

A new version of the form will be made, keeping all the information from the original application, with the exception of file attachments.

You will need to provide files again in the following situations:

- The original account was rejected
- The files are no longer accurate or current (e.g. Passport has been replaced/expired, Proof of Address is older than 3 months)

NEW ACCOUNT NAME








The account name in the original application: **Jersey Corporate No 1**

[Cancel](#) [Clone](#)

Once you have entered the proposed new account name, click 'Clone'.

## / How to use the Clone Feature

As you can see, the Account Holder files area on the new form is empty.

FILES	
Certificate of Incorporation	Upload 
Registry Documents	Upload 
Memorandum & Articles of Association	Upload 
Register of Directors and Members	Upload 
Financial Statement	Upload 
Structure Chart	Upload 
Other	Upload 

**Remember to provide new and updated documents for Entities and People within the structure too, as these are no included in the clone process.**

# / Ownership and Control Structure

You will also note that the Ownership Structure is an identical copy of the original account. Please ensure that you add, remove or edit this structure to reflect that of the new account you are about to submit.

### Handy Tip!

If you are going to be using a base structure for most of your accounts, as is often the case for TCB/ FSB managed accounts. It may be worth preparing a new account form with all the boilerplate information completed, and then you will only need to add the new information that relates to the specific new account. (We will be adding a specific Templates feature in Q2 2025 that will provide easier access to this).

**Ownership and Control Structure (4 Items)**

**RELATED ENTITIES**

The Demo Company Ltd (Account Holder)	Edit	Add Entity	Add interested party
EWG Demo	Edit		Add interested party

**RELATED PERSONS**

Bob Test	Edit	Add Person
Jane Demo	Edit	

**STATEMENTS**

Bob Test owns 50% shares of The demo company Ltd	Edit
Jane Demo owns 25% shares of The demo company Ltd	Edit
Bob Test is a senior managing official of EWG Demo	Edit
EWG Demo owns 25% shares of The demo company Ltd	Edit
Jane Demo owns 100% shares of EWG Demo	Edit

**INFO**

You are only required to include items within the structure that have singular or cumulative ownership or control of +25% or where an individual is a PEP or where by relationship the Person or Entity is deemed to have significant external influence or control.

Once you have amended the structure for the ownership, you can continue with the remainder of the new account application.

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