

# New Account

Appendix -  
Favourites

The specialist digital  
fintech partner for  
Fiduciary, Corporate,  
and Fund Services.

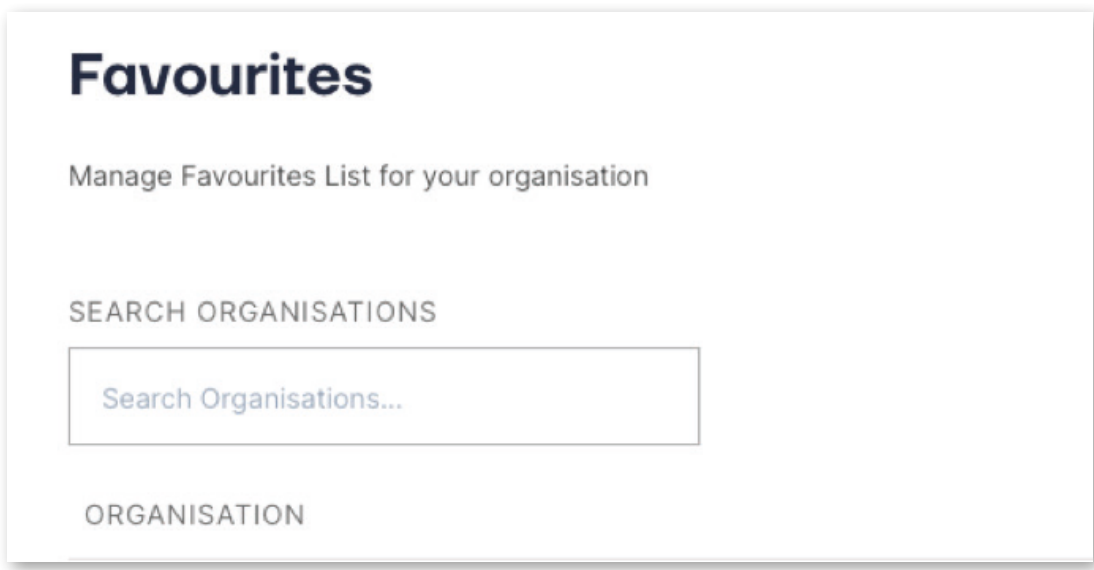
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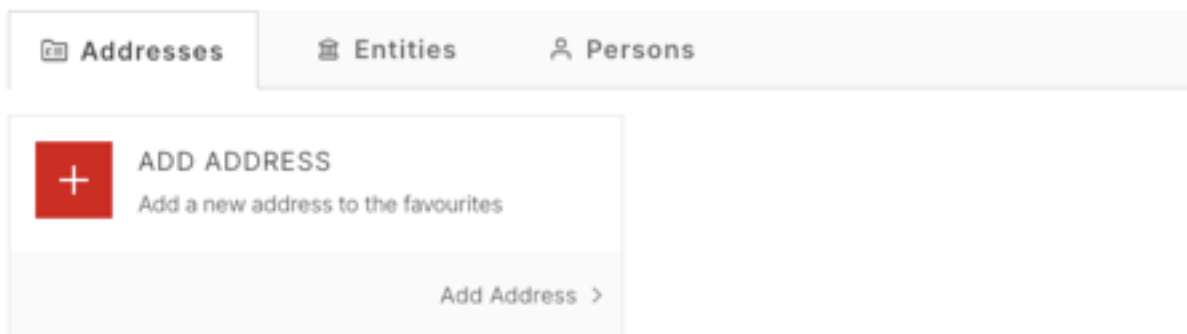
## **/ Favourites Admin**

To manage your Favourites, click on the  Favourites item on the Admin section on the left hand main menu.

You will now be able to view the Organisations you are able to manage Favourites for. Select the relevant one that you wish to work with or use the search box to refine the list.



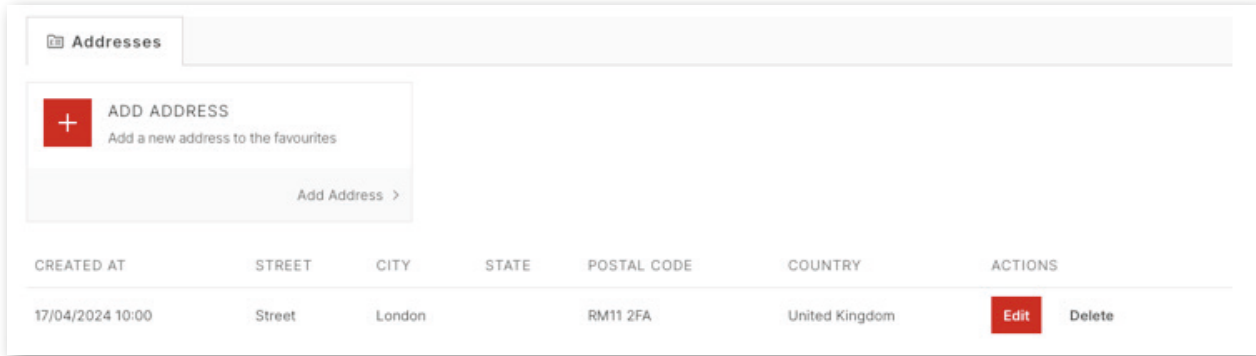
Once you have chosen the Organisation you would like to manage Favourites for you will see the following:



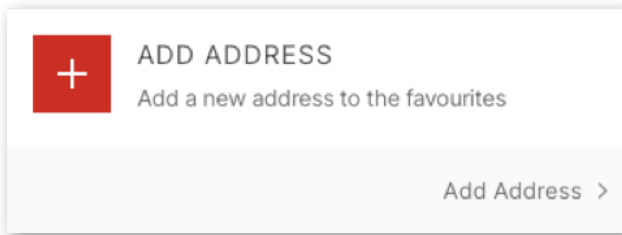
You can use the tabs at the top to access your favourite Addresses, Entities and People.

The ability to manage Favourites is restricted to Org Admin users as well as the new Role of Favourites Admin. To add users to the Favourites Admin role, please contact the EWG Customer Support to activate this new feature.

## / How to use the Management Address Feature



To add a new address to the list, click the 'Add Address' button in the top left.

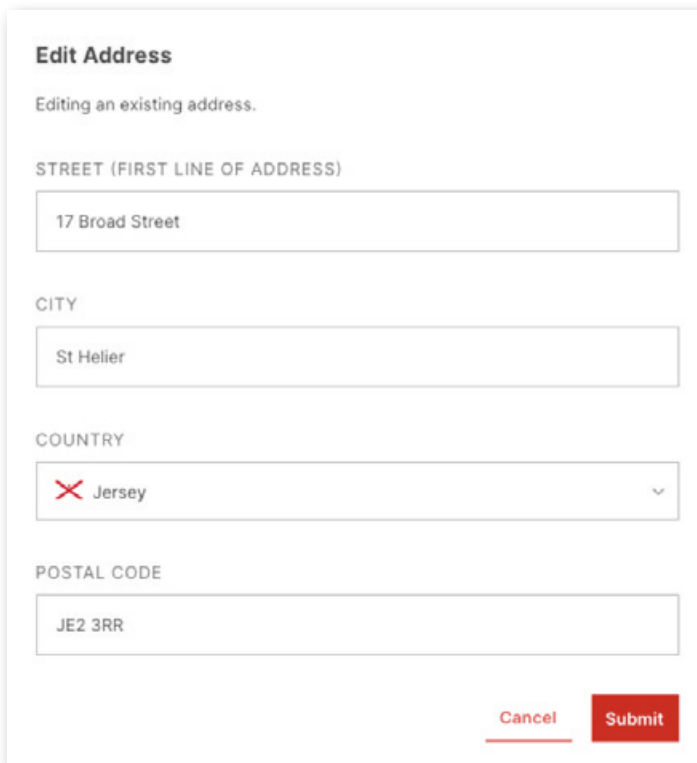


Complete the relevant address fields that you require and then click 'Submit'.

The screenshot shows a form titled 'Add New Address'. Below the title is a message: 'A new address will be added to the list of favourites.' The form contains four input fields: 'STREET (FIRST LINE OF ADDRESS)', 'CITY', 'COUNTRY' (a dropdown menu with 'Select Country...' selected), and 'POSTAL CODE'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Submit'.

## / How to use the Management Address Feature

You can edit this and any other addresses on the list by clicking 'Edit'. You can then amend the address as required and click 'Submit'. Please note that changes made to Favourite addresses will not apply to existing draft or submitted applications, and these will need to have their address re-selected or updated, for the change to be applied.



The screenshot shows a form titled "Edit Address" with the subtitle "Editing an existing address." The form contains four input fields: "STREET (FIRST LINE OF ADDRESS)" with the value "17 Broad Street", "CITY" with the value "St Helier", "COUNTRY" with a dropdown menu showing "Jersey" and a red 'X' icon, and "POSTAL CODE" with the value "JE2 3RR". At the bottom right, there are two buttons: "Cancel" (underlined) and "Submit" (a solid red button).

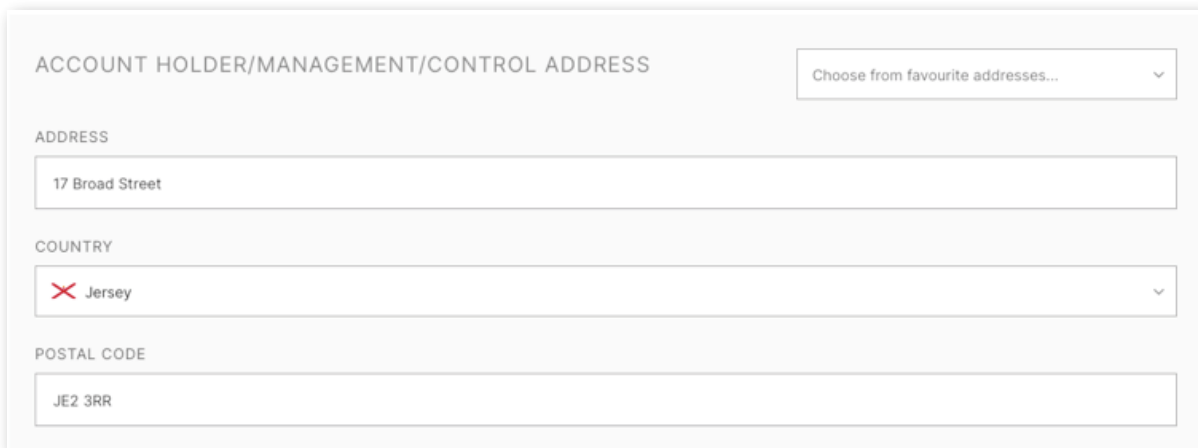
Once you have added or edited an address it will become immediately available for use in forms.

In addition, you may 'Delete' an address from the favourites list. Please note that deletions made to favourite addresses will not apply to existing draft applications. The deleted address will no longer be available for selection from the favourite's dropdown on NEW application forms.

## **/ Using Favourites for the Account Holder/ Management/Control Address**

**IF your Organisation has Favourites enabled, you will see the 'Choose from favourite addresses...' drop down list in the 'Account Holder/Management/Control Address' section of the form. IF you have a large number of addresses in the list, you can search for the one you require.**

**IF you don't see this, please speak to your Organisation Admin to have this enabled by EWG.**



ACCOUNT HOLDER/MANAGEMENT/CONTROL ADDRESS

Choose from favourite addresses... ▾

ADDRESS

17 Broad Street

COUNTRY

✕ Jersey ▾

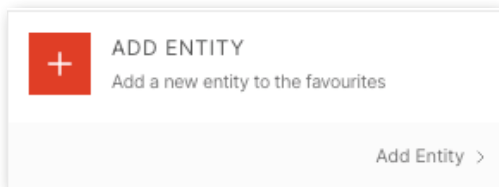
POSTAL CODE

JE2 3RR

## / How to use the Favourite Entities Feature



To add a new entity to the list, select the Entities tab on the favourites page and click 'Add Entity' in the top left.



Continued on the next page.

## / How to use the Favourite Entities Feature

Complete the relevant fields with the entity information and then click ‘Submit’.

**Add New Entity**  
A new entity will be added to the list of favourites.

ENTITY NAME

JURISDICTION  
Select Country... ▾

REGISTRY  
Select... ▾

REGISTRATION NUMBER

FOUNDING DATE  
Select a Date

WEBSITE

[Cancel](#) [Submit](#)



**Add New Entity**  
A new entity will be added to the list of favourites.

ENTITY NAME

JURISDICTION  
United Kingdom ▾

REGISTRY  
UNITED KINGDOM - COMPA... ▾

REGISTRATION NUMBER

FOUNDING DATE

WEBSITE

[Cancel](#) [Submit](#)

You can edit this and any other Entities on the list by clicking ‘Edit’ next to the relevant record. You can then amend the entity details as required and click ‘Submit’.

Please note that changes made to Favourite entities will not apply to existing forms, and these will need to have their details re-selected or manually updated, for the change to be applied.

**Edit Entity**  
Edit an existing entity.

ENTITY NAME

JURISDICTION  
United Kingdom ▾

REGISTRY  
UNITED KINGDOM - COMPA... ▾

REGISTRATION NUMBER

FOUNDING DATE

WEBSITE

[Cancel](#) [Submit](#)

Once you have added or edited an Entity it will become immediately available for use in forms.

## / How to use the Favourite People Feature

**Favourites | Easter Eggs Inc**

Addresses Entities **Persons**

**+** ADD PERSON  
Add a new person to the favourites  
Add Person >

CREATED AT	NAME	SOURCE OF WEALTH	NATIONALITY	DATE OF BIRTH	ACTIONS
13/05/2024 12:38	Demo, Jane Anne	salary	Canada	01/05/2000	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

To add a new Person to the list, click the 'Add Person' button in the top left.

**+** ADD PERSON  
Add a new person to the favourites  
Add Person >

Complete the relevant fields with the persons information and then click 'Submit'.

Continued on the next page.

# / How to use the Favourite People Feature

**Add New Person**  
A new person will be added to the list of favourites.

FAMILY NAME \*  GIVEN NAME \*

MIDDLE NAME  PREVIOUS NAME

NATIONALITY

IDENTIFICATION TYPE  NUMBER

DATE OF BIRTH

PLACE OF BIRTH  
TOWN  COUNTRY

ADDRESSES  
ADDRESS

COUNTRY  POSTCODE

SOURCE OF WEALTH \*

[Cancel](#) [Submit](#)



**Add New Person**  
A new person will be added to the list of favourites.

FAMILY NAME \*  GIVEN NAME \*

MIDDLE NAME  PREVIOUS NAME

NATIONALITY

IDENTIFICATION TYPE  NUMBER

DATE OF BIRTH

PLACE OF BIRTH  
TOWN  COUNTRY

ADDRESSES  
ADDRESS

COUNTRY  POSTCODE

SOURCE OF WEALTH \*

[Cancel](#) [Submit](#)

You can edit this and any other Person on the list by clicking 'Edit' next to the relevant record. You can then amend the details as required and click 'Submit'.

Please note that changes made to Favourite Person will not apply to existing forms, and these will need to have their entities re-selected or manually updated, for the change to be applied.

## / How to use the Favourite People Feature

Once you have added or edited a Person it will become immediately available for use in forms.

### Edit Person

Edit an existing person.

FAMILY NAME *	GIVEN NAME *
<input type="text" value="Smith"/>	<input type="text" value="John"/>
MIDDLE NAME	PREVIOUS NAME
<input type="text" value="Ian"/>	<input type="text"/>
NATIONALITY	
<input type="text" value="United Kingdom"/>	
IDENTIFICATION TYPE	NUMBER
<input type="text" value="PASSPORT"/>	<input type="text" value="66777"/>
DATE OF BIRTH	
<input type="text" value="May 1, 2000"/>	
PLACE OF BIRTH	
TOWN	COUNTRY
<input type="text" value="London"/>	<input type="text" value="United Kingdom"/>
ADDRESSES	
ADDRESS	
<input type="text" value="1 Green Street, London"/>	
COUNTRY	POSTCODE
<input type="text" value="United Kingdom"/>	<input type="text" value="EC1 1AA"/>
SOURCE OF WEALTH *	
<input type="text" value="Directors fees"/>	

[Cancel](#) [Submit](#)

## / How to use the Favourite People Feature

You can also view the full details for a Person record by click 'View' next to the relevant record.

### View Person

View an existing person's details

FAMILY NAME *	GIVEN NAME *
<input type="text" value="Smith"/>	<input type="text" value="John"/>
MIDDLE NAME	PREVIOUS NAME
<input type="text" value="Ian"/>	<input type="text"/>
NATIONALITY	
<input type="text" value="United Kingdom"/>	
IDENTIFICATION TYPE	NUMBER
<input type="text" value="PASSPORT"/>	<input type="text" value="66777"/>
DATE OF BIRTH	
<input type="text" value="May 1, 2000"/>	
PLACE OF BIRTH	
TOWN	COUNTRY
<input type="text" value="London"/>	<input type="text" value="United Kingdom"/>
ADDRESSES	
ADDRESS	
<input type="text" value="1 Green Street, London"/>	
COUNTRY	POSTCODE
<input type="text" value="United Kingdom"/>	<input type="text" value="EC1 1AA"/>
SOURCE OF WEALTH *	
<input type="text" value="Directors fees"/>	

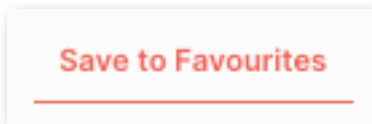
## / Using the Favourites for Account Owner and Ownership

If your Organisation has Favourites enabled, you will see the 'Favourite entities...' or 'Favourite persons...' drop down list in the 'Account Holder' section of the form, depending on if the account is a Corporate or Individual respectively. If you have a large number of items in the list, you can search for the one you require. If you don't see this, please speak to your Organisation Admin to have this enabled by EWG.



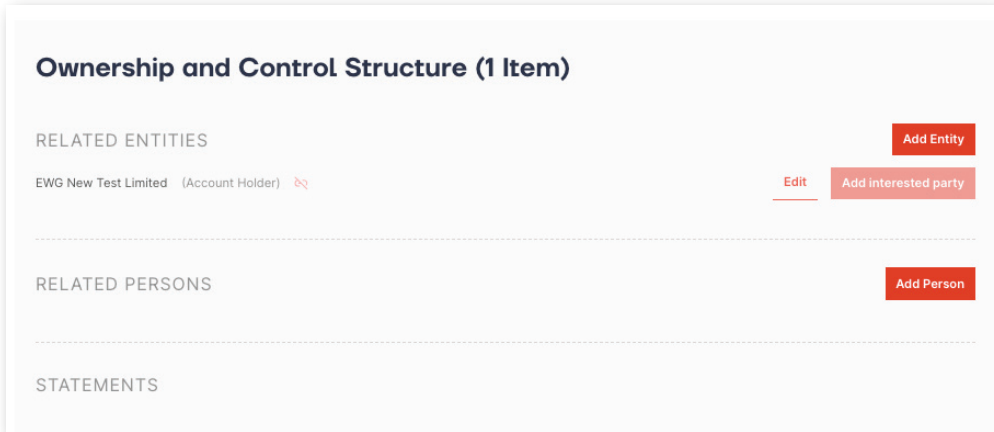
### Handy Tip!

If you are filling in an Entity or Person on a new account form, and you know you are going to use them frequently, you can click the 'Save to Favourites' button.



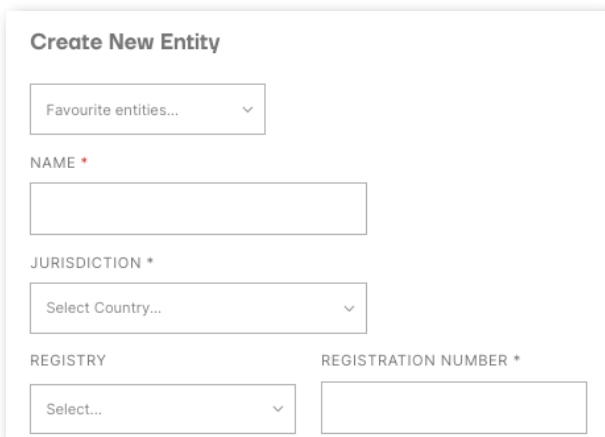
## / Using the Favourites in the Ownership and Control Structure Section

Using Favourites to provide the account ownership and control structure is similar to the account holder section.



If you are adding an entity to the structure, you will see the 'Favourite entities...' drop down at the top of the Create New Entity pop-up. If you have a large number of items in the list, you can search for the one you require.

If you don't see this, please speak to your Organisation Admin to have this enabled by EWG.



### Handy Tip!

If you are filling in an Entity as part of the Ownership and Control Structure section, and you know you are going to use it frequently, you can tick the 'Save Entity to Favourites'. This is a great time saver for regularly used information.

## / Using the Favourites in the Ownership and Control Structure Section

If you are adding a person to the structure, you will see the 'Favourite persons...' drop down at the top of the Create New Person pop-up. If you have a large number of items in the list, you can search for the one you require.

If you don't see this, please speak to your Organisation Admin to have this enabled by EWG.

**Create New Person**

Favourite persons... ▾

GIVEN NAME \*

FAMILY NAME \*

MIDDLE NAME

PREVIOUS NAME

NATIONALITY

Select Country... ▾

IDENTIFICATION TYPE: PASSPORT ▾

NUMBER

DATE OF BIRTH

Select a Date

### Handy Tip!

If you are filling in a Person as part of the Ownership and Control Structure section, and you know you are going to use them frequently, you can tick the 'Save Person to Favourites'. This is a great time saver for regularly used information.

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