

# Designated/ Additional Account

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

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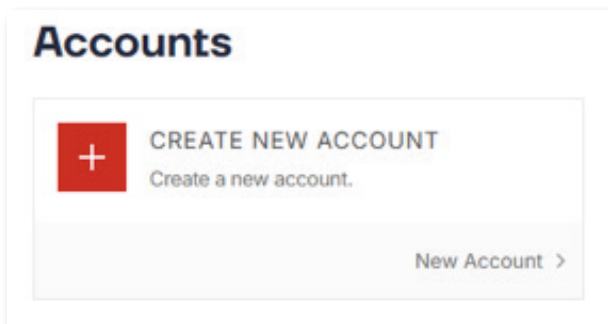
[ewggroup.com](http://ewggroup.com)

**Choose Designated/Additional to create an account which is linked to a pre-existing account. A designated account shares its onboarding documentation with that pre-existing account, thus expediting the application process.**



## / Creating a new Designated Account

Once logged in (following the login guide), go to the navigation bar which is on the left of the screen, and click 'Open New Account'. Click on the 'Create New Account' button.



You will be presented with two account type options:

1. New
2. Designated/Additional

Choose the 'Designated/Additional' radio button.

The screenshot shows the "New Account Application Form" with a progress bar at the top. The progress bar has three steps: "ACCOUNT INFO" (marked with a red X), "ACCOUNT TRANSACTIONAL PROFILE" (marked with a circle), and "REVIEW" (marked with a circle). Below the progress bar, there are two sections: "ACCOUNT INFO PAGE" and "ACCOUNT TYPE".

**ACCOUNT INFO PAGE** (1 OF 8 COMPLETED)

The New Account User manual can be downloaded [here](#) to assist you in completing this form. INFO

**ACCOUNT TYPE** (1 OF 1 COMPLETED)

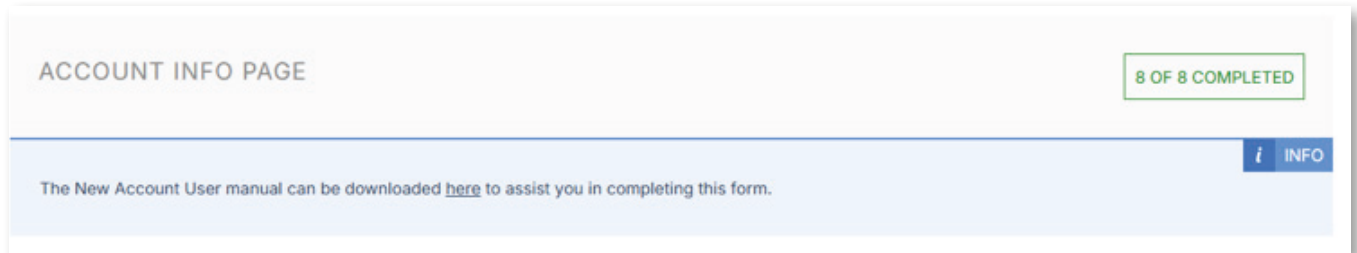
New  Designated/Additional

**New** accounts require a full set of onboarding documentation to be provided, and are subject to a broader range of compliance checks.

Choose **Designated/Additional** to create an account which is linked to a pre-existing account. A designated account shares its onboarding documentation with that pre existing account, thus expediting the application process. INFO

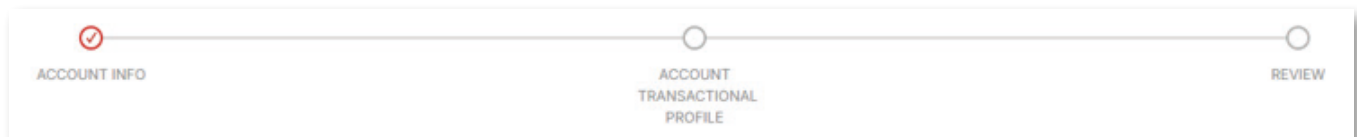
## / Support and guidance

You can refer to our user manuals via the link at the top of the page.

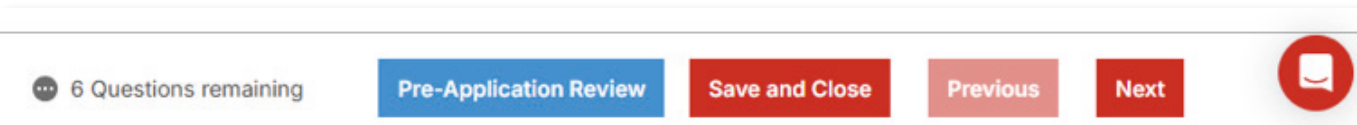


## / Tracking your progress

This progress bar at the top of the page informs you how many items you are required to complete.



At the bottom of the page, you will see details regarding the total number of question areas to complete.



### Handy Tip!

If you have not yet used our 'Pre-application Review' feature, please refer to our user guides for more information.

## / Adding the designated account information

- / Select the Pre-Existing account from the drop-down menu.**
- / Enter the name of the new delegated/additional account.**
- / Enter a description for the new accounts source of funds.**

DESIGNATED ACCOUNT INFO
4 OF 4 COMPLETED

PARENT ORGANISATION / EWG CLIENT ACCOUNT GROUP \*

XYZ Org

PRE EXISTING ACCOUNT \*

Alpha Account

NEW ACCOUNT NAME \*

Designated Demo Account

SOURCE OF FUNDS \*

Purpose/general operation of where the money comes from.

Source of funds information

Parent Organisation / EWG Client Account Group refers to the Organisation to inherit payment authorisation roles and rules from.

Pre Existing Account refers to the Account to inherit onboarding information from.

i INFO

- / Enter the reason / purpose for the account.**
- / Enter countries you anticipate that transactions will be occurring to/from. The system uses predictive entry so as you start typing, options will be shown. E.g. FR - France.**
- / Press Tab or click on it, to select the recommended option.**
- / Enter the anticipated currencies that the account will be using.**

REASON FOR ACCOUNT
3 OF 3 COMPLETED

REASON(S) FOR ACCOUNT \*

Reason for account details

ANTICIPATED COUNTRIES FOR TRANSACTIONS \*

Countries where funding is likely to come from or be paid to.

United Kingdom x

ANTICIPATED CURRENCIES FOR THE ACCOUNT \*

Currencies that are likely to be received or sent from the account. The list only consists of Currencies that EWG are able to offer.

British Pound x

# / Account Transactional Profile

Enter the estimated fundings, payments and conversions for the account.

### New Account Application Form

ACCOUNT INFO      ACCOUNT TRANSACTIONAL PROFILE      REVIEW

#### FUNDINGS

ESTIMATED VALUE OF FUNDINGS AND INCOMING PAYMENTS PER YEAR (GBP) \*

0-99,999

ESTIMATED NUMBER OF FUNDINGS AND INCOMING PAYMENTS PER YEAR \*

0-24

#### PAYMENTS

ESTIMATED VALUE OF ALL PAYMENT INSTRUCTIONS MADE PER YEAR (GBP) \*

0-99,999

ESTIMATED NUMBER OF PAYMENT INSTRUCTIONS MADE PER YEAR \*

0-24

#### CURRENCY CONVERSIONS

ESTIMATED VALUE OF CURRENCY CONVERSIONS PER YEAR (GBP EQUIVALENT) \*

0-99,999

ESTIMATED NUMBER OF CURRENCY CONVERSIONS PER YEAR \*


0-24


## / Review form

- / Review all the details provided are correct and present.
- / Save the form allows you to come back to the application later.

### Review Form


**PRINT**  
Save a copy of the completed application form.  
[Print >](#)

**SAVE THE FORM**  
Save this form with collected values and you can continue it later.  
[Save the form >](#)

**SUBMIT THE FORM**  
Submit the form with collected values  
[Submit >](#)

Once the form is submitted you can track its progress from the accounts view.

### Accounts

**CREATE NEW ACCOUNT**  
Create a new account.  
[New Account >](#)

SEARCH ACCOUNT SUBMISSION

ACCOUNT NAME	CREATED AT	STATUS	VIEW/EDIT	CLONE	DELETE
Designated Demo Account	21 Nov, 2024 3:31 PM	Submitted	<a href="#">View</a>	<a href="#">Clone</a>	<a href="#">Delete</a>

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