

# LV= Platform Services

## Direct Credit Information for Financial Advisers

Payments are made into an account via direct debit. This is the most effective way to automatically allocate the funds to your clients' accounts and execute any investment instructions.

If you do need to make a payment by direct credit, you must ensure the client's account is open on the platform, the payment is made to the correct bank account and that the full reference is completed including the sub account reference, for example:

Bank: \_\_\_\_\_

Bank Account Name: \_\_\_\_\_

Account: \_\_\_\_\_

Sort Code: \_\_\_\_\_

Client reference: \_\_\_\_\_

If we are unable to match funds to the client's account the funds will be returned.

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0800 032 9357



lvplatformservices@LV.com



my.lv.com

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