



# Quick Guide to Opening a Plan



Please follow these simple steps:

1.

## REGISTER

If you already registered with us, please go to step 3. Otherwise, complete a Financial Intermediary Registration Form found on [www.beechwoodbermuda.com](http://www.beechwoodbermuda.com) under the Advisors/Financial Intermediaries section. Sign and fax to (441) 248-6898.

2.

## ACTIVATE YOUR ACCOUNT

Once your registration has been processed, you will receive an email with information on how to set-up your account. Please follow the steps provided in the email to successfully log-in to your account at [www.beechwoodbermuda.com/login/](http://www.beechwoodbermuda.com/login/).

3.

## OBTAIN CLIENT APPLICATION PACKAGE

After logging in to your Beechwood Bermuda account, go to the documents section of the website and download the Application.

4.

## FILL OUT CLIENT FORMS

Read and carefully complete the Application, including the wire transmittal information. Our forms are "fillable", (they can be filled out electronically in Adobe Acrobat). They can also be filled out by hand.

5.

## SIGN / OBTAIN SIGNATURES

Please be sure all the relevant areas are signed by you and by the Settlor (and other relevant signatories). If you completed the fillable form, you will need to print and sign/obtain signatures.

6.

## REVIEW THE APPLICATION PACKAGE

Check that your Application Package is complete. A complete Application Package will include:

- A completed and signed Application, including the wire transmittal information.
- All the required documentation. The full list of required documentation can be found on Page 10 (Part II, Section 7) of the Application Form

7.

## SUBMIT THE APPLICATION PACKAGE

The Application package can be faxed or emailed to:  
Email: [contact@beechwoodbermuda.com](mailto:contact@beechwoodbermuda.com) Fax: (441) 248-6898

8.

## RECEIVE APPLICATION APPROVAL

Advisors/Financial Intermediaries will be notified via email that the Application is in good order.

9.

## WIRE PREMIUM TO BEECHWOOD BERMUDA ACCOUNT

Use completed wire transmittal information (found at the end of the Client Application) as a guide to wire the funds to the Beechwood Bermuda Account.