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a clean canvas to a lifestyle of opportunities

Manhattan Road Map

The aim of this document is to provide introducers a clear method to follow to facilitate optimum processing of new business for the Manhattan Yield Instrument

There are two options; Online (a) or Manual (b)

a) The prospect can complete the whole process from start to finish online via the platform, this is faster and way more efficient.

b However, some people simply prefer the traditional manual/paperwork approach. This is slower but easier for those who do not enjoy online processes and IT generally

Our approach is not to force anyone to use methods they do not feel comfortable with so we accept both. We will outline both options below. You can use which ever you feel best for each situation you find yourself dealing with.

Manhattan Online

Online Process

1. Send your affiliate link (this is a crucial step – do not use my or anyone else's affiliate link) to the prospect and they will click that link and follow the process. It begins with the opening of their account, followed by an email asking them to verify their account. When verified they can access the Manhattan platform and when they click on the Invest Now tab on the fact sheets, it will present them with the NDA to authorise. They can then proceed to complete everything online and submit their AML documents online also. They can do this from start to finish very easily within 5 minutes.
2. They will be sent their subscription agreement (SA) by email (always into their spam or junk until they set the email address as safe) which they can DocuSign. They will receive a countersigned copy back from Manhattan.
3. The completed SA will contain the funding details allowing them to send their funds. They should obtain a full proof of transfer (POT) from their bank and upload this also online to Manhattan.
4. They will receive an email confirming all is received and their investment is live. Everything is now live on the platform. You will see them, as your client, live on your platform also.
5. The prospect is now a client and full management is done online via the platform, reinvestment, withdrawal, top up is all online and very efficient.

Manhattan Manual

Manual Process

1. Send your manual NDA paperwork to the client and ask them to sign and return to you.
2. Ask the client to send you their AML and additional data as follows

-Mobile number

-Personal email

-Passport copy

-Selfie photo holding their passport open at photo page beside their face (do not obstruct either passport or face, must be full exposure of both)

-Proof of residential address (POA), must be within 3 months old

-Latest bank statement showing proof of funds (POF). A single bank statement, not multiple months

-Tax number in their current country of residence

-Current employment and designation (or status such as – retired – business owner – other with explanation)

3. Then using the data, you now have received, complete the manual order form (you have copies of this in the same email with this attachment you are reading). Make sure everything is derived from the AML data to ensure everything matches up perfectly. Enter your details where it says agent details. Every section on the manual order form needs completing (applicant 2 details only need completing when it is a joint application). If it is a corporate application then please ask your Titanium contact what are current AML requirements.

Manhattan Manual

4. Send the completed order form to the client for them to check and sign and return to you. We always recommend using a DocuSign account, but of course good old email will suffice
5. You now have the complete set of required AML details and a signed order form which matches the AML data perfectly. Send both the AML data (POA, POF, Passport copy & Selfie) and the signed order form onto to admin@titaniumsolutions.io
6. Titanium admin will then load all the data plus order form content onto the platform manually. Manhattan will receive this online and conduct AML checks
7. Manhattan may ask for further requirements but this rarely happens. Most often Manhattan will then send the subscription agreement (SA) to the prospect by email for them to DocuSign. The prospect will DocuSign and then receive a countersigned version back from Manhattan, containing funding directions.
8. Prospect can then fund and obtain full proof of transfer (POT) and send to you. You send onto to admin@titaniumsolutions.io
9. The prospect will receive an email confirming all is live and then you can if you choose get the client logged into the platform and allow them online access where they will enjoy full access to Manhattan and online management of their investment. Or of course you can manage everything on behalf of the client and allow them to ignore the online platform if they prefer.