User instructions

Registration for insurance intermediaries

31. October 2023

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1 Change control

The change control page shows the status of this document. Every change results in a new version x.0. The initial version is 1.0.

Change control

Version	Date	Change made by	Comment
0.1			

Review

Version	Date	Change reviewed by	Comment

Approval

Version	Date	Approved by	Comment

Distribution list

Organisation	Member of staff

2   Introduction

In order to register for the first time or submit follow-up documentation as an untied insurance intermediary, you require access to the EHP. To register with FINMA via the EHP you need to register once on the FINMA portal and complete self-registration. These instructions will guide you through this process step by step.
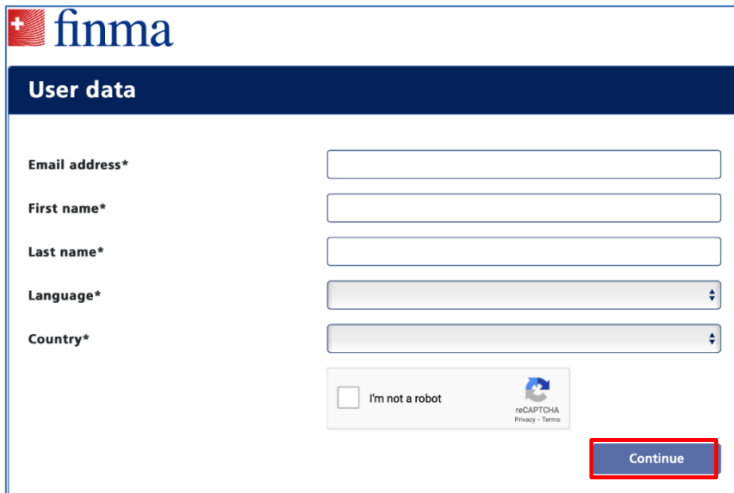
3 FINMA portal registration

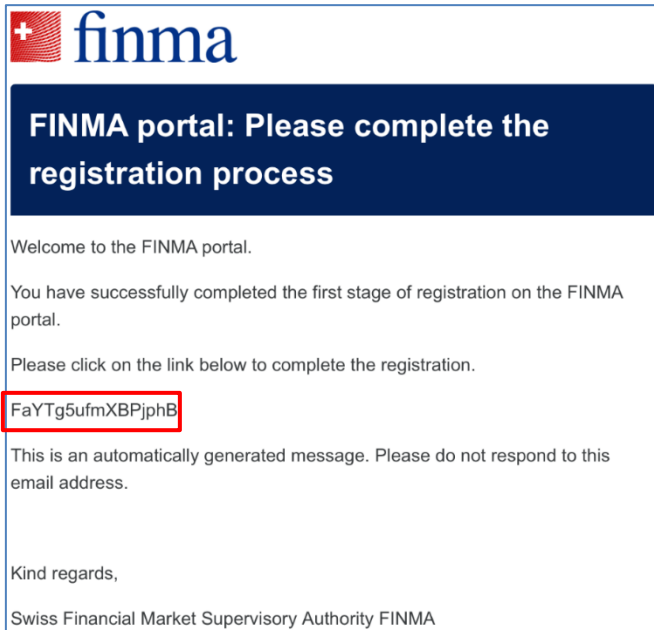Untied insurance intermediaries register on the FINMA portal as follows:

3.1 Open the page "FINMA portal registration".

3.2 Fill in the required fields with your personal data and click **[Continue]**:
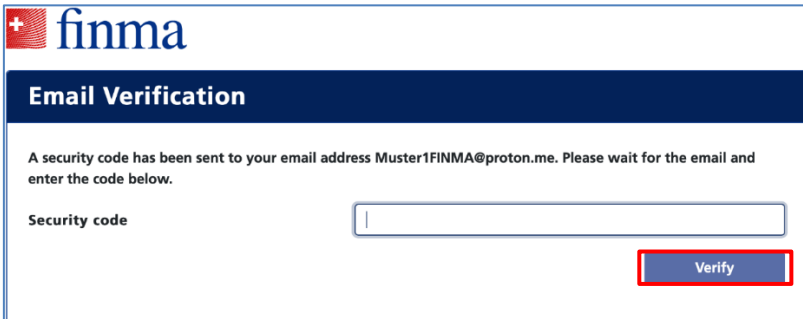
3.3 A security code will be sent to the email address you provided.

3.4   Please enter the security code.

3.5   Please read and agree to the terms of use.

3.6   Set your personal password and then click **[Next]**:

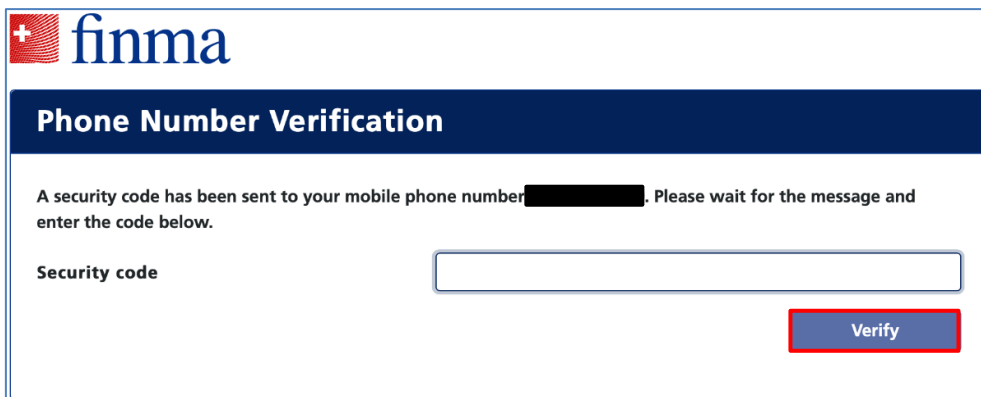*(pay attention to the requirements when creating your password)*

3.7 Enter your mobile phone number in international format (e.g. +41) and click **[Verify]**:
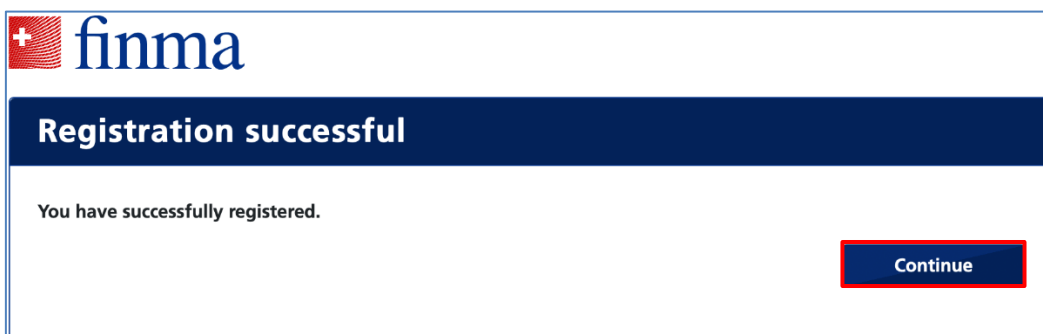
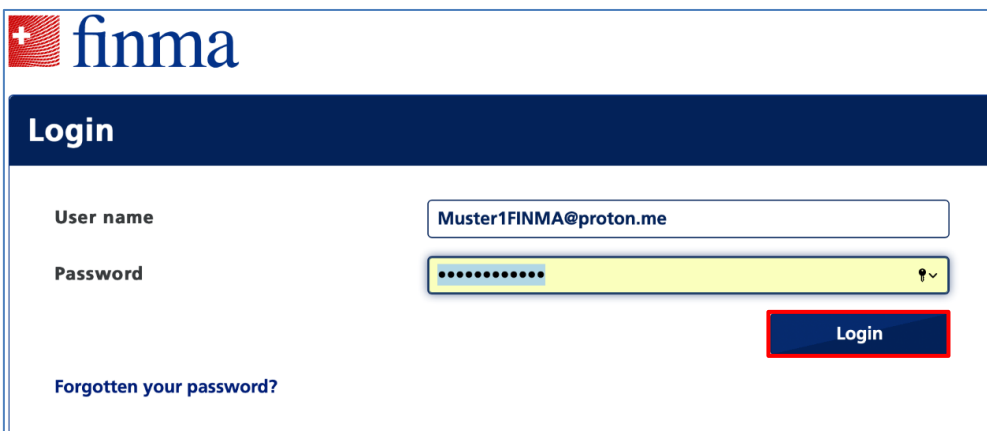*Note: It is not possible to log in without entering a mobile phone number due to two-factor authentication.*

3.8 Please enter the security code sent by SMS.

3.9 The registration is now complete. Click **[Continue]** and you will be redirected to the FINMA portal. Alternatively, the portal can be accessed via the URL https://portal.finma.ch or via the FINMA website.

3.10   Log in with your email address and password. Click **[Login]**:
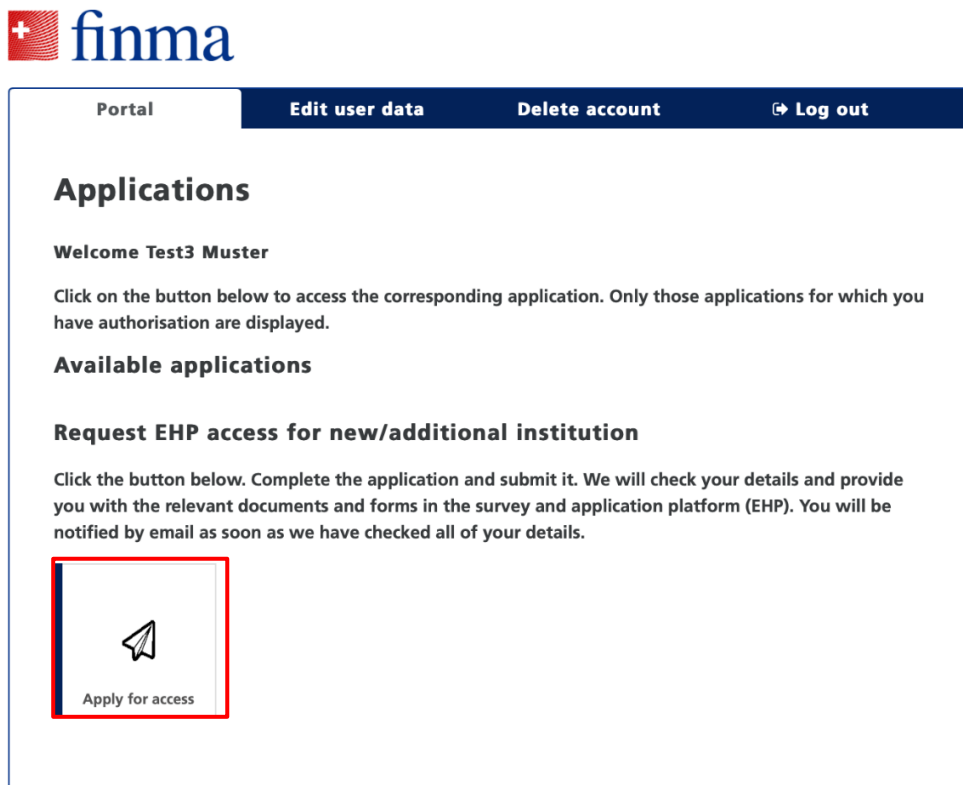
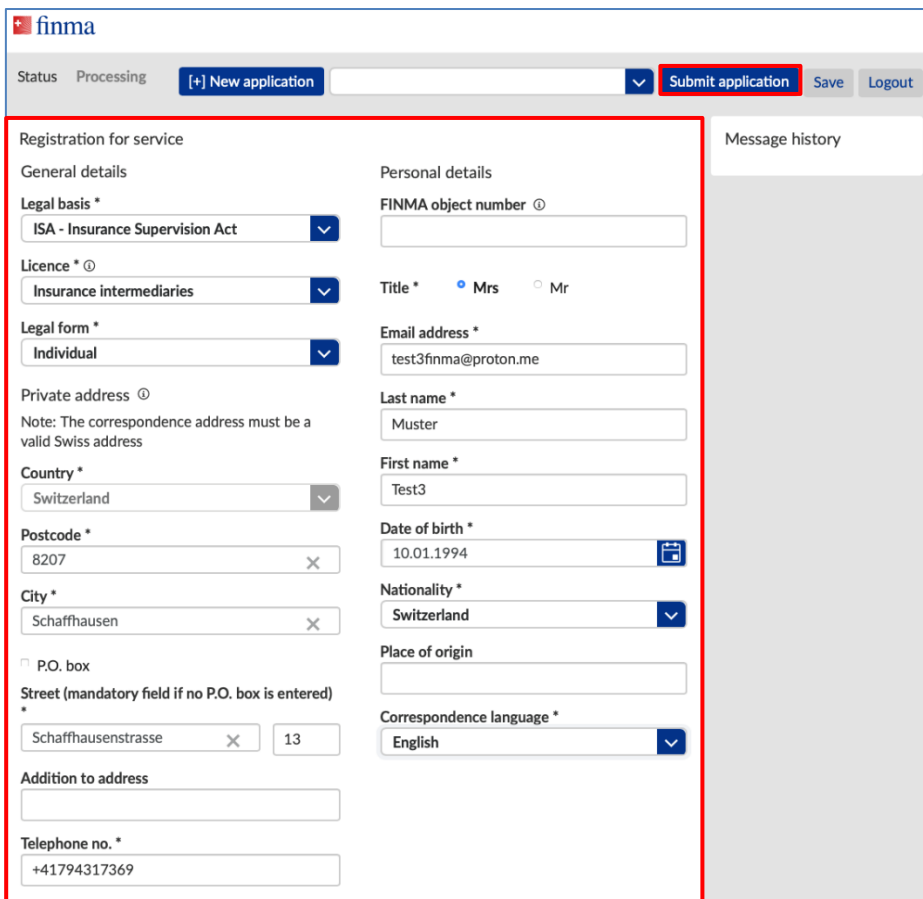# 4   Apply for EHP access (self-registration)

4.1   To access the survey and application platform, log in to the FINMA portal as described in paragraph 3.10 and click the [**Apply for access**] button:

4.2 Complete and submit the application form by clicking the [**Submit application**] button:

4.3 Please confirm your details:

4.4 Once your details have been successfully checked, you will be notified by email within a few working days. You can then log in to the FINMA portal and access the documents and forms provided from 01.01.2024.
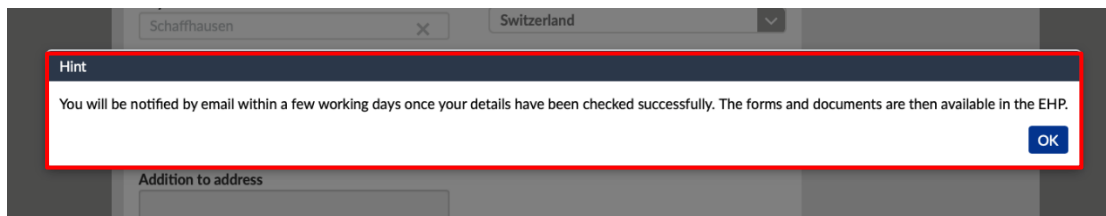
5 EHP application

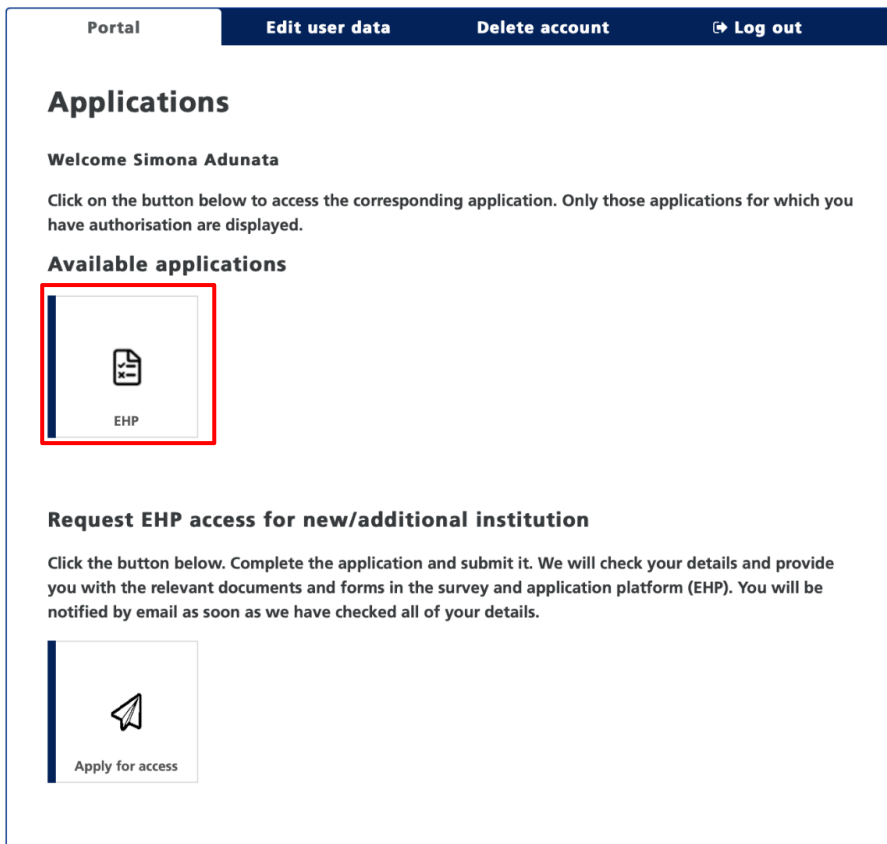5.1 Click on the "EHP" button to access the application. The documents provided will be available to you in the EHP from 1 January 2024.

6 FINMA portal use

The portal can be accessed via the URL https://portal.finma.ch or alternatively via the FINMA website. Once you are logged in to the FINMA portal, you have the following options:

7 Annex