Doorway Integration Note — How the Adviser's Enrollment Fits the Platform's Consent Flow

Model Program Advisors, LLC (proposed) · a multi-program commodity trading advisor · mpaclient.com
Design note for the platform team and counsel · October 28, 2026 · Principal: Austin Putt

1. The principle

The member meets two parties and signs two sets of paper, but should never be asked the same thing twice. The platform's existing five-step consent flow already covers everything that is the platform's to ask: that trading is optional and done in the member's own account; that the API key is trade-only; that leverage is the venue's and is the member's election; that the model is the member's own choice; and the Tech Pass performance contribution. The adviser's doorway asks only what the adviser is required to ask and nothing the platform already has: delivery consent, Disclosure Document receipt, the NFA Rule 2-30 financial questions, and the Client Agreement. Model election, limits, and the account link stay on the platform side, where they already live, and the adviser relies on the platform's records of them under its infrastructure license.

2. Who asks what

Subject	Platform consent flow (existing, 5 steps)	Adviser doorway (new, 4 steps)
Trading is optional; own account; no advice	Step 1 — Trading	— (Disclosure Document restates it)
Trade-only API key; account link	Step 2 — Connect	— (adviser verifies the key's permissions through the platform's daily check and records the result)
Leverage election and warnings	Step 3 — Leverage	— (Risk Disclosure Statement covers program leverage)
Model election; own accord; stop control	Step 4 — Model	— (the election is the member's and is recorded by the platform; the Client Agreement §2 refers to it)
Limits: position size, per-trade cap, margin level	Platform trade-settings screen after Step 4	— (Client Agreement §2 and §3 refer to "the Client's configured parameters" on the platform; loosening a limit on an adviser program triggers the adviser's Limits Change Risk Acknowledgment inside the platform screen)
Performance fee	Step 5 — explains that AI Trade Pros charges none, and that the 15% shown with the tiers is the **adviser's** incentive-fee rate for adviser programs, the same for every tier	Client Agreement §5 states the fee; the adviser invoices it
Consent to electronic delivery and signatures	—	**Step 1 — E-Delivery Consent + Disclosure Document receipt**

Subject	Platform consent flow (existing, 5 steps)	Adviser doorway (new, 4 steps)
Financial situation, experience, "did anyone recommend" (NFA 2-30)	—	**Step 2 — Client Information**
Advisory Client Agreement, fee, arbitration, privacy notice	—	**Step 3 — Client Agreement**
Confirmation, documents delivered, reaffirmation date	—	**Step 4 — Confirmation**

3. When the adviser doorway opens

The platform's model picker shows every published model. Models approved as adviser programs carry an "Adviser program" tag and the adviser's name. When a member who is not yet an adviser client selects one, the platform opens the adviser doorway (single sign-on, same session) **before** the platform's Step 4 — Model consent. On completion the member returns to the picker with the program selectable; Steps 4 and the limits screen then run as they do for any model, with two text additions (§4). A member who is already an adviser client goes straight to Step 4. A member who declines or abandons the doorway is returned to the picker with the adviser program unselected and nothing recorded by the adviser except that the doorway was opened and closed.

4. Three changes to the platform's existing flow

Step 4 — Model, one added paragraph when the model is an adviser program: "This model is a trading program of Model Program Advisors, LLC, a registered commodity trading advisor and a separate company from AI Trade Pros. Your election to follow it is recorded under your Advisory Client Agreement with the adviser, which you signed in the adviser's doorway; the adviser's fee under that agreement applies to this program. AI Trade Pros provides the software and gives no advice."

Step 5 — Performance fee: there is no platform performance fee. The popup states that AI Trade Pros charges none; that the 15% shown with the Tech Pass tiers is the adviser's incentive-fee rate (the same for every tier), charged only on adviser programs under the member's Client Agreement with the adviser, invoiced by the adviser; and, during pre-launch, that no adviser program exists so no performance fee of any kind applies. (The Clean-Pool rule at the point of consent: advisory revenue is the adviser's and never touches the platform.) **Note (Oct 29):** the rate is flat across tiers, so no tier-linked fee question arises; the adviser sets and discloses it in its Disclosure Document §4 and WebPros receives nothing from it.

Limits screen, one gate: when a member loosens a limit on an adviser program, the platform presents the adviser's Limits Change Risk Acknowledgment (MPA-06) in place of its own confirmation, and records the signature to the adviser's client file.

5. What the adviser receives from the platform, under the license

For each client: the signed records of platform Steps 1–4 (date, version, IP), the limits in force and their history, the key-permission verification log, and the venue's trade and equity data for the client's account — enough to satisfy

the adviser's supervisory procedures and to compute fees — and nothing about the member's brand relationship, Tech Pass tier, rewards, or marketer.

6. Adding steps later

If the adviser needs further consents (for example a venue-specific futures acknowledgment, or a second program type), they are added to the adviser's four-step doorway, not to the platform's five, so that each party's record stays its own. If the platform ever needs its own second set of five, the pattern is the same: platform asks platform things, adviser asks adviser things, and the gate in §3 decides the order.

Design note. Not legal advice; counsel to confirm the allocation of consents between the platform and the adviser, in particular that the adviser's reliance on platform-held election and limits records satisfies Client Agreement §3 and NFA recordkeeping.