

**INTRODUCER APPLICATION**

|  |  |
| --- | --- |
| Company Name |  |
| Company Address |  |
| Company telephone number |  |
| Company email address |  |
| Company website |  |
| Company status, e.g. Ltd co, sole trader |  |
| Type of business |  |
| Company registration number (Ltd Co.’s) |  |
| FCA Number and/or Interim number |  |
| Network name (if applicable) |  |
| Data protection licence number |  |

**Contacts**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Company owner/Director name |  | | | | |
| Company owner/Director direct line |  | | | | |
| Company owner/Director mobile telephone number |  | | | | |
| Company owner/Director email address |  | | | | |
| Company owner/Director home address |  | | | | |
| Have you, or any company connected to you, ever been removed, disciplined or refused permission to trade by any regulatory or authorising body or been removed from any lenders panel? | | YES |  | NO |  |

If yes, please provide full details

|  |
| --- |
|  |

**PLEASE NOTE: There are some regulatory permissions needed just to introduce commercial mortgages to us if this introduction is ‘by way of business.’ Where this is required, we will advise you and discuss with you the options in how you can obtain the appropriate regulatory permission if you do not already have this.**

Bank details for commission payment

|  |  |  |  |
| --- | --- | --- | --- |
| Name of Bank |  | Account holder name |  |
| Account number |  | Sort code |  |

**IMPORTANT** *List anyone whom has client contact within your business OR with whom you would like us to liaise with or provide case updates to on the next page:* **PLEASE PROVIDE A COPY OF THEIR PASSPORT FOR EVERY CONTACT LISTED**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Contact name - 1 |  | | | | |
| Position in business of contact |  | | | | |
| Contact direct line |  | | | | |
| Contact mobile telephone number |  | | | | |
| Contact email address |  | | | | |
| Contact home address |  | | | | |
| Have you, or any company connected to you, ever been removed, disciplined or refused permission to trade by any regulatory or authorising body or been removed from any lenders panel? | | YES |  | NO |  |

If yes, please provide full details

|  |
| --- |
|  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Contact name - 2 |  | | | | |
| Position in business of contact |  | | | | |
| Contact direct line |  | | | | |
| Contact mobile telephone number |  | | | | |
| Contact email address |  | | | | |
| Contact home address |  | | | | |
| Have you, or any company connected to you, ever been removed, disciplined or refused permission to trade by any regulatory or authorising body or been removed from any lenders panel? | | YES |  | NO |  |

If yes, please provide full details

|  |
| --- |
|  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Contact name - 3 |  | | | | |
| Position in business of contact |  | | | | |
| Contact direct line |  | | | | |
| Contact mobile telephone number |  | | | | |
| Contact email address |  | | | | |
| Contact home address |  | | | | |
| Have you, or any company connected to you, ever been removed, disciplined or refused permission to trade by any regulatory or authorising body or been removed from any lenders panel? | | YES |  | NO |  |

If yes, please provide full details

|  |
| --- |
|  |

*Continue on a separate sheet if needed*

**INTRODUCED PRODUCTS** (Client referral)

If you do not have the appropriate lender agency or regulatory permissions to transact or provide advice for a particular product, you may introduce your client to us. An authorised Adviser will be appointed who will take responsibility for the client advice and therefore will need to liaise with your client to determine and recommend the most appropriate product for their needs.

Our Adviser will charge for the advice. Client fees are typically £250.00 on application and up to 1% on mortgage / loan offer. Assured Funding Ltd., may also receive a commission from the lender / provider.

As the introducer, you will receive a percentage of any lender / provider commission received. The amount to be shared will be confirmed within the Introducer Agreement document. On a case by case basis we may charge an alternative fee or pay away a different commission sum by mutual agreement.

|  |  |  |  |
| --- | --- | --- | --- |
| Signed |  | Date |  |
| Name |  | Position |  |

--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

|  |  |  |  |
| --- | --- | --- | --- |
| *Date received by Assured Funding Ltd* |  | *Review Date and Proceed to Agreement* |  |