

Income Protection
For financial adviser use only.

**BRITISH
FRIENDLY**

Intermediary Application Form

Confidential

Thank you for your interest in British Friendly. Please complete this form and return it with the requested documentation to sales@britishfriendly.com or 45 Bromham Road, Bedford MK40 2AA.



Important Information: This application form must be completed and signed by the Principle Firm. Appointed Representatives should not complete this form.

Section 1 – Details of Firm

Full Name of Intermediary Firm:

Trading Name of Intermediary Firm:
(if applicable)

Type of Firm: (please tick one)

- ☐ Limited Company ☐ Partnership ☐ Other
☐ Sole Proprietor ☐ Limited Liability Partnership (LLP)

If 'Other' is selected, please confirm your businesses legal form

Trading address:

Registered Office:
(Not required for sole traders)

Postcode:

Telephone number:

Email address:

Website address:

Contact name, address and
postcode, for service of notices
under the Income Protection -
Intermediary Terms of Business:

Full names of directors, partners,
or sole proprietor:

Section 2 – Status of Intermediary Firm

FCA Firm Reference No. (FRN):

Companies House Number:
(if applicable)

ICO Reference No.:

Are you a member of a compliance support services organisation?

☐ Yes ☐ No

If yes, please provide their name:

Section 3 – Bank Details

The commission options currently available are indemnity and non-indemnity. Please note that we do not offer commission offset.

We also offer commission sacrifice, available via the application process on the online portal.

Please note:

- Other than in the case of a sole trader, we are unable to pay into a personal bank account, so you'll need to provide us with the bank account details for your firm; and
- We will only make payments into high street bank accounts, we do not make payments to online-only accounts.

Please provide details of the bank account you would like commission payments paid into:

Name of bank:

Address:

Postcode:

Sort code:

Account number:

Name of account:

Email address for commission statements:

Section 4 – About your firm

What business model does your firm use? (please tick all that apply)

☐ Advised

☐ Non-advised

☐ Face to face

☐ Telephone only

What processes and controls are in place to monitor advisers and ensure no inappropriate selling takes place? (ie. file checking and buying compliance support)

Do you buy leads?

☐ Yes

☐ No

If yes, then from who?

Do you charge customers any additional fees? (e.g. early cancellation charges)

☐ Yes

☐ No

If yes, please provide details

Does your firm engage with any customers who may be considered vulnerable?

☐ Yes

☐ No

If yes, please outline how you identify, support, and manage interactions with such customers.

Section 5 – Identification

For the purposes of Anti-Money Laundering regulations, we are obliged to know the intermediaries we are dealing with and to verify their identity. To conduct appropriate due diligence checks, we require proof of at least one director's, partner's or the proprietors identity at application stage.

Please tick the ID you are providing, please attach this along with the application form and send to sales@britishfriendly.com.

☐ Valid Drivers Licence

AND

☐ Company bank statement
(dated within past 3 months)

OR

☐ Valid Passport

AND

☐ Company bank statement (dated within past 3 months)

AND

☐ Personal utility bill

Please be aware we cannot onboard your agency until all of the correct ID documents have been received.

Section 6 – Confirmation

For the purposes of applicable anti-money laundering law and regulation, I/we confirm that I/we will supply identification/ verification documentation on request by the Society for legal, regulatory or auditing purposes. I acknowledge that you will not accept this application without such documentation.

I/We confirm that the answers given above are correct to the best of my/our knowledge and belief.

I/We have read, understand and agree to the terms of the Society's Privacy Policy for Intermediaries, the latest version of which can be accessed at <https://www.britishfriendly.com/info/privacy-policy/>.

I/We also understand that, where you are required to do so in order to fulfil your contractual obligations to me/us or to our customers or where you have a legitimate business interest in doing so, you may share this personal data with your service providers, agents and third parties including but not limited to:

- auditors;
- identity authentication agencies;
- medical agencies;
- reinsurers and other insurers;
- underwriters;
- industry forums;
- fraud prevention and law enforcement agencies; and
- legal and regulatory bodies including the Association of British Insurers.

I/We acknowledge receipt of a copy of the Society's Income Protection - Intermediary Terms of Business and agree to abide by them. I/We confirm our understanding that by completing and returning this application form we shall be deemed to have accepted the Society's Income Protection - Intermediary Terms of Business.

I/We understand that any information provided in this application form will be used and stored as described in the Society's Privacy Policy for Intermediaries and in the 'Data Protection' section of the Income Protection - Intermediary Terms of Business.

I/We confirm that I/we am/are duly authorised to enter into an agreement with the Society on behalf of the Intermediary named in this application form.

Name: (please print)

Status of signatory:

(please note that only directors, partners or sole proprietors may sign this application form)

Signature on behalf of the Intermediary Firm:

Date:

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Section 7 – Communications about our products and services

We may email you about similar products and services we offer.

If you are an **individual, sole trader** or **partner in a general partnership**, you can opt out of these emails now or at any time in the future.

☐ Tick here if you do not want to receive marketing emails from British Friendly.

British Friendly Society Limited

45 Bromham Road, Bedford, MK40 2AA

T: 01234 348007

E: sales@britishfriendly.com

W: www.britishfriendly.com

**BRITISH
FRIENDLY**

British Friendly Society Limited is incorporated under the Friendly Societies Act 1992. Registered Office: 45 Bromham Road, Bedford MK40 2AA. Registered No. 392F. It is a member of the Association of Financial Mutuals. British Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority Ref: 110013.

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