



Applying to LifeQuote

Thank you for your interest in LifeQuote, part of Direct Life and Pension Services Limited.

LifeQuote's services have been developed to support advisers actively advising on, and arranging, pure protection products including life insurance, critical illness cover, income protection, whole of life and business protection.

If you wish to apply for access to LifeQuote please complete the application form and return it to:

NewRequests@LifeQuote.co.uk

OR

Agency Department
LifeQuote
Friars House
52A East Street
Chichester
West Sussex
PO19 1JG

On receipt of your application, we will send you access to the system and you can get started.

Within a week, we will complete checks e.g. credit score, Company accounts and FCA status to assess your application and it is standard practice to request a personal guarantee where indemnity commission will be paid to you.

If a personal guarantee is not provided, or in the unlikely event an application is not accepted, we may ask for additional information and/or pay commission on a non-indemnity basis.

If you have any questions please call (01243) 817 908.

FIRM DETAILS

Firm name as appearing on the FCA register

Full postal address from which business is conducted OR full postal address of the principal place of business including postcode

Postcode:

Main point of contact

Main point of contact email address

Main office telephone number

Main point of contact mobile number

FIRM INFORMATION

To help us with your application please briefly explain the following:

What is your core business?

Are your sales advised or non-advised?

Where do you source your protection leads?

Do you sell over the telephone or face to face?

What volumes do you expect to write?

Are you a network?

REGULATORY DETAILS

If the firm is Directly Authorised:

FCA Number

If the firm is an Appointed Representative:

Principal Name

Principal FCA Number

Firm FCA Number

DETAILS OF BUSINESS WRITERS

Please use additional copies of this page if there are more than three business writers.

Name
Phone Number
Email Address
iPipeline webID

Name
Phone Number
Email Address
iPipeline webID

Name
Phone Number
Email Address
iPipeline webID

SOLE TRADER, PARTNERS OR DIRECTORS

The following information is required for the sole trader or all partners or all directors.

Please use additional copies of this page if there are more than three partners or directors.

Title
Date of Birth
Full home address

Name
Position in Firm

Postcode:

Title
Date of Birth
Full home address

Name
Position in Firm

Postcode:

Title
Date of Birth
Full home address

Name
Position in Firm

Postcode:

PROFESSIONAL STANDING

Has the sole trader or any partners or any director or any businesses with which they are or have ever been associated with ever:

been the subject of a receiving order?
entered into an arrangement with creditors?
been a director of a company which was wound up other than for purposes of amalgamation or reconstruction?
been the subject of a court judgement for outstanding debts?
had applications refused by insurance companies or any other institutions?
been convicted of criminal offences other than motoring offences?
held indemnity commission debts with insurance companies which remained unpaid for at least three months?

If you have answered Yes to any of the above questions please provide full details on a separate sheet.

COMMISSION

Please confirm your preferred indemnity basis

Indemnity Non-Indemnity (this will include a fee per completed application)

If no indication is made we will process business on an indemnity basis.

Commission payments are made by BACS. Please provide details of the bank account into which the commission should be paid.

Sort Code Account number

Account name

DECLARATIONS

The following is required for the sole trader or all partners or all directors.

Please use additional copies of this page if there are more than three partners or directors.

I/We hereby apply to be registered with LifeQuote (hereinafter referred to as "the Company") as a user and I/we acknowledge that the Company shall not be obliged on the basis of this application form to accept my/our application. If the Company accepts in principle my/our application then my/our appointment as a user of the Company shall only take effect when both I/we and the Company shall have signed the LifeQuote Intermediary Services Agreement evidencing the details and obligations of the Company and its users, or we have received the LifeQuote standard Intermediary Terms of Business agreement.

I/We confirm that the information in this application is accurate and complete to the best of my/our knowledge and belief and that I/we have taken all reasonable steps to ensure that this is the case. I/we will notify the Company immediately if there is a change to the information given in this application.

In assessing my/our application Direct Life & Pension Services Limited may search files made available to it by credit reference agencies who may keep records of such searches.

Once you have submitted an application, we will retain your personal data for one year where no contract is in force. We will retain your personal data for a period of 50 years if a contract has been effected. But, upon termination of a contract we will delete all adviser sensitive data once 6 years has elapsed. Our data handling policy is available on the LifeQuote Portal.

Type name below and tick here for submission of this application by electronic signature.

Print Name
Signed

Date

Print Name
Signed

Date

Print Name
Signed

Date
