

TOOLBOX LICENCE REGISTRATION

Please complete this form to sign up for our Toolbox Licence.



Please complete this form and email in to customerservices@tmaclub.com.

This must only be completed by the Principal of a firm. If you have any questions, please contact our Support desk on 0330 303 0236.

By completing this form, you are authorising us (TMA) to create agencies for the providers. You are also confirming you are happy to comply with the terms outlined by the Providers' agency terms and conditions.

If there is in sufficient space on this form please provide this information on a separate sheet, sign it and attach to the email with this form.

FULL NAME OF PRINCIPAL		FIRM NAME	
PRINCIPAL'S EMAIL ADDRESS		FIRM FCA NUMBER	
NUMBER OF ADVISERS AT FRIM		DATE OF BIRTH	
BRANCH AUTHORISATION			
Mortgage	Protection	GI	Equity Release
			Wealth
WHICH TOOLBOX LICENCE ARE YOU APPLYING FOR?			
Full Access		GI Quote and Apply	

If you would like us to setup your additional advisers and Confirm adviser authorisation, please supply adviser details below:

First Name	Surname	Email Address		
Please tick the below for adviser access:				
Full Access	Adviser Access	GI Quote and Apply	Ipipeline	Twenty7Tec
Mortgage	Protection	GI	Equity Release	Wealth

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First Name	Surname	Email Address

Please tick the below for adviser access:				
Full Access	Adviser Access	GI Quote and Apply	Ipipeline	Twenty7Tec
Mortgage	Protection	GI	Equity Release	Wealth

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Administrator Access:

First Name	Surname	Email Address
Please tick the below for administrator access:		
Full access/commissions	Access to adviser clients	Access to restricted adviser clients

First Name	Surname	Email Address
Please tick the below for adviser access:		
Full access/commissions	Access to adviser clients	Access to restricted adviser clients

	TOTAL NUMBER OF LICENCES	TOTAL COST
IPIPELINE		
TWENTY7TEC		
TOOLBOX LICENCE		
READ ONLY TOOLBOX LICENCE		
TOTAL		

Would you like TMA to keep you up to date with other products and services?

By ticking the box below, you are giving explicit consent for TMA to use the email addresses in the form for marketing purposes:

A minimum notice cancellation period of 3 months will be applicable for all Toolbox licences.

DATE	PRINCIPAL'S SIGNATURE

Please return completed form to customer.services@tmaclub.com