

Please complete this form to sign up for our Toolbox Licence and email it to customerservices@tmaclub.com.

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

If there is insufficient 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 FIRM		DATE OF BIRTH	
FIRM AUTHORISATION – PLEASE TICK BELOW			
Mortgage	<input type="checkbox"/>	Protection	<input type="checkbox"/>
GI	<input type="checkbox"/>	Equity Release	<input type="checkbox"/>
Wealth	<input type="checkbox"/>		

If you would like us to setup your additional advisers or administrators, please confirm the following details:

First Name	Surname	Email Address
Please tick which areas are required:		
Full Admin Access	Adviser Only Access	Mortgage Fact Find
Equity Release Fact Find	Wealth Fact Find	Solution Builder Sourcing

First Name	Surname	Email Address
Please tick which areas are required:		
Full Admin Access	Adviser Only Access	Mortgage Fact Find
Equity Release Fact Find	Wealth Fact Find	Solution Builder Sourcing

First Name	Surname	Email Address		
Please tick which areas are required:				
Full Admin Access	Adviser Only Access	Mortgage Fact Find	Protection Fact Find	GI Fact Find
Equity Release Fact Find	Wealth Fact Find	Solution Builder Sourcing	Twenty7Tec Sourcing	

First Name	Surname	Email Address		
Please tick which areas are required:				
Full Admin Access	Adviser Only Access	Mortgage Fact Find	Protection Fact Find	GI Fact Find
Equity Release Fact Find	Wealth Fact Find	Solution Builder Sourcing	Twenty7Tec Sourcing	

Administrator Only Access:

First Name	Surname	Email Address
Please tick which areas are required:		
Full access/commissions	Access to adviser clients	Access to restricted adviser clients

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

DATE	PRINCIPAL'S SIGNATURE

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

Please return completed form to customerservices@tmaclub.com