

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.

We have an arrangement where you can retain your own agency arrangement with insurers and receive your commission level directly meaning we act on your behalf for a modest monthly license fee and an application fee per case.

We will only charge you a fee per application not per client for the services we provide.

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.

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:

Do you currently have insurer agencies?

Are you a network?

--	--

What volumes do you expect to write?

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	

Name	
Phone Number	
Email Address	
iPipeline webID	

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