

**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.

**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  Sole proprietor

Trading Address:

Postcode:

Registered Office: (if a limited company)

Postcode:

Telephone number:

Fax number:

Email address:

Website address:

Contact name and address for service of notices under the Intermediary Terms of Business:

Postcode:

If the firm is a limited company or partnership please provide a list of the full names of directors or partners:

## Section 2 - Status of Intermediary Firm

Are you directly authorised by the Financial Conduct Authority?  Yes  No

If Yes please state the FCA Firm Reference No. (FRN):

Are you part of a network?  Yes  No

Company House number (if applicable):

Are you a member of a compliance support services organisation?  Yes  No

If yes, please provide their name:

## Section 3 - Bank details and commission

Upon submission of each client application, you must notify us of the basis on which you would like commission to be paid. The options currently available are indemnity, non-indemnity and no commission. Please note that we do not offer commission offset.

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

Name of bank:

Address:

Postcode:

Bank Sort Code:

Account Number:

Name of Account:

E-mail address for commission statements:

## Section 4 - About your firm

What business model does your firm use? (tick all that apply)  Face to face  Telephone  Advised  Non-advised

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

Lead Generation

Do you use referrals?  Yes  No

If yes, are agreements in place?  Yes  No

Do you use introducers?  Yes  No

If yes, are agreements in place?  Yes  No

Do you buy leads?  Yes  No

If yes, then who?

## 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 identity at application stage. This may be provided in the form of:

- A copy of a valid UK photo-card driving license, and a copy of a company bank statement (dated within the last 3 months)

If you don't have a driving license we will require the following:

- A copy of a valid passport
- A personal utility bill (dated within the last 3 months)
- A copy of company bank statement (dated within the last 3 months)

## 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, as set out in the Intermediary Terms of Business, the latest version of which can be accessed at <https://advisers.britishfriendly.com/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 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 Intermediary Terms of Business.

I/We understand that any information provided in this application form will be used and stored by the Society for the purposes of processing this application form and for the purposes set out in the 'Data Protection' section of the Intermediary Terms of Business.

I/We agree that the Society may use my/our information in order to provide me/us with information on products or services which may be of interest to me/us by:

- E-mail
- Telephone
- Post

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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**British Friendly Society Limited**

Registered Office:

45 Bromham Road, Bedford MK40 2AA

Telephone:

**01234 358344**

Fax:

**01234 327879**

Email:

**[support@britishfriendly.com](mailto:support@britishfriendly.com)**

Web:

**[advisers.britishfriendly.com](http://advisers.britishfriendly.com)**

LinkedIn:

**[linkedin.com/company/british-friendly-society](https://linkedin.com/company/british-friendly-society)**

Twitter:

**[twitter.com/BritishFriendly](https://twitter.com/BritishFriendly)**

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Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Version 22.02.23

**BRITISH  
FRIENDLY**

It feels good to be covered