Mortgages I New Firm Application Form
Complete this form to register to your firm to sign up to PMS Mortgage Club.

PMS

The principal of the firm must complete and sign this application form. For advice and assistance in completing this form, please contact: **0345 230 8000** or email: **info@trustpms.com**

Section 1: Firm Details			
Firm name: (as registered with the FCA)		FCA number:	
Principal name:			
Contact number:			
Principal email address:			
Firm registered address with FCA:			
Name of current network (if applicable): Please check with your network if you can register with PMS			
Reason for choosing PMS:			
Number of mortgage cases written per month			
Current compliance provider:			
Firm permissions:			
Investment ☐	Mortgage ☐	Protection ☐	General insurance ☐
Number of advisers at the firm		Firm projected annual turnover:	

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Have the firm or any advisers at the firm (if yes please provide additional details in the notes section):	
Been subject to disciplinary action by the FCA or other supervisory body?	Yes ☐ No ☐
Been removed from a lenders panels in the last 12 months?	Yes ☐ No ☐

Section 2: Adviser Details

Please list all advisers who you wish to be registered to use PMS:

Title:		Full Name:	
Email address:			
Contact number:			
PMS would like to contact you for events, exclusive products and propisition updates:	Allow ☐	Do not allow ☐	

Title:		Full Name:	
Email address:			
Contact number:			
PMS would like to contact you for events, exclusive products and propisition updates:	Allow ☐	Do not allow ☐	

Title:		Full Name:	
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Section 3: Notes

Section 4: Bank details

To ensure prompt payment of procuration fees:	
Account name:	
Bank or Building Society name:	
Account number:	
Sort code	
Email address for your firm's commision statements:	

Section 5: Declaration

This section must be completed and signed by the Principal of the firm (as listed in Section 1)
I confirm that I am the firm's principal and the details stated on this form are accurate and that I have read and agree to the Terms & Conditions and Data Privacy Notice.

Full name:	
Position in company:	
Signature:	
Date:	

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