Zenith Application Form

Complete this form to receive enhanced Zenith Protection rates (95%)

Information correct as at: 06/02/2026 V3.0

Once you have completed this application, please email it to: protection@trustpms.com

The principal of the firm must complete and sign this application form. For advice and assistance in completing this form, please contact**: 0345 230 6000** or email: **protection@trustpms.com**

By completing this application form you are authorising Premier Mortgage Service Limited (trading as PMS) to create agencies with its protection providers. You are also confirming that you will adhere to the respective providers' agency terms and conditions.

If a question is **not applicable**, please indicate this clearly. If there is insufficient space for a detailed answer, or you need to provide additional information, this can be provided on a separate sheet. Any separate sheets must be signed and dated.

Section 1: Firm Details

Firm Name: (as registered with the FCA)	**FCA Number:**
Firm Status: Ltd ☐ **LLP** ☐ **Sole Trader** ☐ **Partnership** ☐ **Other** (please specify)	
Principal Name:	**Contact Number:**
Principal Email Address:	
Firm Registered Address with FCA:	**Firm Trading Address:** (if different)
Firm Turnover:	**Do you currently write protection business? Y** ☐ **N** ☐
Number of protection cases a month?	**Are your sales: Advised Non-Advised**

Section 2: Appointed Representatives

If your company has any Appointed Representatives, please list the full details here. Please note that all AR's within your group will be moved to the PMS commission terms under each provider. Only Principal firms can complete this application form.

Firm Name:	FCA Number:	Main Contact Name and Email:

Premier Mortgage Service and PMS are trading styles of Premier Mortgage Service Limited, a company registered in England and Wales with number 5011650. Registered office: Aviva, Wellington Row, York, YO90 1WR.

Section 3: Panel Request

Notes:

Agency requests: Providers will be asked to mirror your current agency terms, but this will not be guaranteed. This will be determined by the individual providers own processes and procedures. You will need to check your terms with the providers before you submit any business. If you would like your indemnity terms to be changed; upon confirmation of your new agencies, please contact providers directly who will advise of the process and if this is available to your firm.

Section 4: Sourcing Systems

If you are an iPipeline (Assureweb) user, iPipeline will reflect the Zenith protection panel. You will receive new logins which you will need to use to access the correct panels. We will share data about your firm and your advisers with iPipeline (Assureweb) for this purpose.

I am happy to share data about my firm and advisers with iPipeline (Assureweb) for this purpose. Y ☐ N ☐

If you are an Exchange user, please tick the box below to ensure that The Exchange will reflect the Zenith protection panel and you will use your existing logins. We will share data about your firm and your advisers with Iress The Exchange for this purpose.

I am happy to share data about my firm and advisers with IRESS (The Exchange). Y ☐ N ☐

Section 5: Adviser Details

Please list all advisers who require access to your chosen portal.

Title:	Adviser Name:	Email Address:	Mobile Number:

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Section 6: Terms & Conditions *95/5%*

1. Premier Mortgage Service Limited (trading as PMS, "PMS") has negotiated and agreed advantageous products, commission rates, services and exclusive protection products with protection product providers (the "Services"). By completing this Application Form and joining our protection panel propositions you can access the Services, which are available via:
   i. Ipipeline and The Exchange;
   ii. Provider extranets provided by the protection product providers; and
   iii. Other distribution channels that we may communicate to you from time to time.
2. You will endeavour to place protection business through Zenith, unless client circumstances or the FCA Handbook requires otherwise.
3. Before you can submit any business to any of the protection product providers, you will be required to enter into separate terms of business with those protection product providers. These separate terms of business will govern your relationship with the protection product providers and you are required to adhere to them.
4. You agree that PMS can receive payments that may be classed as commission from the protection providers directly. You pass on the right to receive said commission to PMS. You must disclose the gross commission paid by protection product providers. Commission rates payable can be found on our website at www.trustpms.com, and are subject to change from time to time.
5. You will receive 95% of the gross commission paid by the protection product providers arising out of business written by you under the Zenith panel, with PMS receiving the remaining 5%. In relation to business written by you with The Shepherd Friendly Society Limited ("Shepherds") under the Zenith panel, PMS will receive 5% of the annual premium for each policy and you will receive the remainder as set out in the Zenith commission table, which may be amended by us from time to time.
6. You agree that we may share data (including commissions earnings data) about your firm, your advisers and the business which you have transacted using the Services with new and existing panel protection product providers, sourcing system providers and other Sesame Bankhall Group companies for administration purposes.
7. Your liability to repay commission ("Clawback") will be in direct proportion to the percentage of commission you have received (e.g. you will be liable for 95% of the Clawback and PMS will be liable for the remaining 5%).
8. PMS reserves the right to remove your access to the Services at any time. You acknowledge and accept that the protection product providers have the right to refuse or revoke your firm's agencies to submit business under the Zenith panel proposition.
9. These short form terms and conditions only govern your access to the Services and business written by you arising out of such Services. Any other services provided by PMS will be governed by separate agreement.
10. You agree to the use of your personal data as detailed in the **data privacy notice**. You confirm you have the relevant consent from the advisers listed in Section 4 above to share their personal data with PMS, the protection product providers on the protection panel proposition you are applying to join and the sourcing system provider you use.

This form must be signed by the Principal of the firm (as listed in Section1)

Full Name:	
Signature:	**Date:**

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Section 7: Declaration *95/5%*

This section must be completed and signed by the Principal of the firm (as listed in Section 1)

I give my permission to the following providers to set up my agencies or move my existing agencies to PMS Zenith:

Canada Life (Group) ☐	**Aviva** ☐	**British Friendly** ☐	**Cirencester Friendly** ☐
Guardian ☐	**Holloway Friendly** ☐	**Legal & General** ☐	**LV=** ☐
Royal London ☐	**Scottish Widows** ☐	**Shepherd's Friendly** ☐	**The Exeter** ☐
Unum ☐	**Vitality** ☐	**Zurich** ☐	

Firm FRN:

Provider instruction declaration: I give authority for PMS to instruct providers to amend the firm's agencies and panels on our behalf.

Full Name:	
Signature:	**Date:**

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