Solo Application Form

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

Information correct as at: 25/07/2024 V1.0

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 the protection provider on PMS's single tie protection proposition known as "Solo". 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 ("ARs"), please list the full details here. Please note that all of your company's ARs 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:

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Section 3: Proposition Request

Notes:

Agency requests: The provider will be asked to mirror your current agency terms, e.g. 2 or 4 year clawback period, indemnity or non-indemnity but this will not be guaranteed. This will be determined by the provider's own processes and procedures. You will need to check your terms with the provider before you submit any business. If you would like your indemnity terms to be changed; upon confirmation of your new agency, please contact the provider 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 Solo protection proposition. You will receive new logins which you will need to use to access the correct proposition. 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 ☐

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 the protection product provider on Solo (the "Services"). By completing this Application Form and joining our protection propositions you can access the Services, which are available via:
   i. Ipipeline;
   ii. Provider extranet provided by the protection product provider; and
   iii. Other distribution channels that we may communicate to you from time to time.
2. You shall submit at least 85% of your company's protection business through Solo, unless client circumstances or the FCA Handbook requires otherwise. Without prejudice to the generality of clause 8 in these short form terms and conditions, PMS reserves the right to remove your access to the Services if you fail to comply with this clause 2.
3. Before you can submit any business to the protection product provider, you will be required to enter into separate terms of business with that protection product provider. This separate terms of business will govern your relationship with the protection product provider 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 provider directly. You pass on the right to receive said commission to PMS. You must disclose the gross commission paid by protection product providers.
5. You will receive 95% of the gross commission paid by the protection product provider arising out of business written by you under the Solo proposition, with PMS receiving the remaining 5%.
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 the protection product provider under Solo, sourcing system providers and other Sesame Bankhall Group companies for administration purposes.
7. You will authorise PMS to obtain and receive data from the product provider under Solo to verify the levels of business submitted by your company through Solo and you shall take any reasonable action required by PMS to enable PMS to receive such data.
8. 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%).
9. 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 Solo panel proposition.
10. 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.
11. **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 provider on the protection 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 Aviva to set up my agencies or move my existing agencies to PMS Solo.

Aviva Single Tie
☐

Full Name:	
Signature:	**Date:**

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