

Protection | Protection Application Form



Complete this form to register to your firm to sign up to PMS Protection.

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 <input type="checkbox"/> LLP <input type="checkbox"/> Sole trader <input type="checkbox"/> Partnership <input type="checkbox"/> 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 <input type="checkbox"/> N <input type="checkbox"/>	Number of protection cases a month?

SECTION 2: PANEL REQUEST

Enhanced Protection Rate Options (Please tick to join PMS Protection)

Zenith <input type="checkbox"/>	Market Protection <input type="checkbox"/>	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 3: SOURCING SYSTEMS

If you are an iPipeline (Assureweb) user, iPipeline will reflect your chosen protection panel. You will receive new logins which you will need to use to access the correct panels, please tick the relevant box below.

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 your chosen protection panel. We will share data about your firm and your advisers with Iress The Exchange for this purpose.

Do you and your stated advisers require access to The Exchange Y N

SECTION 4: ADVISER DETAILS

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

Title	Adviser Name	Email Address	Mobile Number

FOR INTERMEDIARY USE ONLY

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: Pixham End, Dorking, Surrey, RH4 1QA.

SECTION 5: TERMS AND CONDITIONS

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. Pipeline 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. Where you have chosen to access the Zenith protection panel, 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. Where you have chosen to access the Zenith protection panel, 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%.
6. Where you have chosen to access PMS’ market protection panel, you will receive 96.5% of the gross commission paid by the protection product providers arising out of business written by you under PMS’ market protection panel, with PMS receiving the remaining 3.5%.
7. 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.
8. Your liability to repay commission (“Clawback”) will be in direct proportion to the percentage of commission you have received (e.g. if you have accessed the Zenith panel, 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.
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.

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

Full Name:	RKAM name (if applicable):
Job Title	Date
Signature:	

FOR INTERMEDIARY USE ONLY

SECTION 6: DECLARATION

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.

Aegon <input type="checkbox"/>	AIG <input type="checkbox"/>	Aviva <input type="checkbox"/>	Legal and General <input type="checkbox"/>	LV= <input type="checkbox"/>
Royal London <input type="checkbox"/>	Scottish Widows <input type="checkbox"/>	Vitality <input type="checkbox"/>	Zurich <input type="checkbox"/>	

Full Name:

Job Title:

Signature:

Date: