

# Protection | Aviva Express Insurance Application Form

Complete this form to join the Aviva Express Life Insurance Single-Tie Product (95%)

14/03/19 V1.0

Once you have completed this application please email it to: [protection@trustpms.com](mailto: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](mailto:protection@trustpms.com).

By completing this application form you are:

- Authorising Premier Mortgage Service Limited to create agencies with Aviva on the firm's behalf; and
- Confirming that the firm shall comply with the terms and conditions set out in section 3 below.

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: ADVISER DETAILS

Please list all advisers who require access to Aviva Express Life Insurance.

Title	First Name	Last 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 3: TERMS AND CONDITIONS

1. Premier Mortgage Service Limited (trading as PMS, "PMS") has negotiated and agreed a simplified protection proposition ("Aviva Express Life") with Aviva Life & Pensions UK Limited ("Aviva").
2. Your access to the Aviva Express Life proposition shall not commence until Aviva has confirmed this to you.
3. Before you can submit any business to Aviva, you will be required to enter into separate terms of business with them. These separate terms of business will govern your relationship with Aviva and you are required to adhere to them.
4. Access to the Aviva Express Life proposition is on a single-tie basis.
5. The amount of cover provided for in respect of any customer under the Aviva Express Life proposition must not exceed any of the following:
  - a. the mortgage amount and term;
  - b. £500,000 of life cover; or
  - c. £300,000 of critical illness cover.
6. You agree that PMS can receive payments that may be classed as commission from Aviva directly. You pass on the right to receive said commission to PMS. You must disclose the gross commission paid by Aviva. Commission rates payable can be found on our website at [www.trustpms.com](http://www.trustpms.com), and are subject to change from time to time.
7. You will receive 95% of the gross commission paid by Aviva arising out of business written by you under the Aviva Express Life proposition, with PMS receiving the remaining 5%.
8. You agree that we may share data (including commissions earnings data and information around business written through other provider agencies) about your firm, your advisers and the business which you have transacted using the Aviva Express Life Insurance proposition with Aviva, and other Sesame Bankhall Group companies for administration purposes.
9. 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%).
10. PMS reserves the right to remove your access to the Aviva Express Life proposition at any time.
11. Your access to the Aviva Express Life proposition shall terminate immediately should PMS's arrangements with Aviva concerning the Aviva Express Life proposition terminate.
12. These short form terms and conditions only govern your access to the Aviva Express Life proposition. Any other services provided by PMS will be governed by separate agreement.
13. **You confirm you have the relevant consent from the advisers listed in Section 2 above to share their personal data with PMS and Aviva.**

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

<b>Full Name:</b>	<b>RKAM name:</b>
<b>Signature:</b>	<b>Date:</b>