

# Join our panel

Your Name

Company Name

Telephone No.

Email

Company Address

Company Postcode

Website

Company FCA Registration No.

Are you Directly Authorised (DA) or an Appointed Representative (AR)?

DA  AR

Appointed Representatives please enter FCA No.

Which network(s) are you a part of?

Do you have a preferred Mortgage Club?

Do you charge your clients a broker fee?

YES  NO

Which of the following best reflects your business mix?

>75% Residential  >75% Buy to Let   
Equal Split  Other

On average, as an individual, how many mortgages do you write on a monthly basis?

0-5  6-20  21+

How long have you been a mortgage adviser?

Up to 2 Years  3-5 Years  6+ years

How many mortgage advisers are there in your office?

One  2-3  6+

## Furness Building Society - Intermediary Terms of Business.

The following are the general terms of business for intermediaries upon which we intend to rely. When you join our panel you will be deemed to have agreed to them. Should you fail to comply, Furness Building Society reserves the right to remove you from its intermediary panel, irrespective of any other action taken.

### By registering you agree:

- To ensure that you always have your customer's authority to act on their behalf, and their permission to pass information to Furness Building Society. The Society reserves the right to contact the customer.
- It is your responsibility to ensure your customer is fully aware, that by processing an AIP on the online trading facility, Furness Building Society will search your customer's credit file and a record of that search will be left (it will leave a hard foot print on the customers records).
- To advise all customers of what will happen to their personal data and what, if anything, will be disclosed to other parties. No disclosure of personal data will be allowed without prior consent of the customer.
- For regulated business you have all the appropriate authorisations from the Financial Conduct Authority (FCA) to submit applications and adhere to the requirements of Consumer Duty regulation, including reviewing our fair value assessments.
- To only submit business for your own customers and not to process or submit any business through us on behalf of another adviser.
- To Furness Building Society undertaking appropriate checking before appointing me to their Intermediary Panel (this checking may include obtaining appropriate credit and business searches or contacting Mortgage Clubs or Networks).

### Introducer Declaration

I confirm that in accordance with current Money Laundering Regulations, I will have undertaken appropriate 'Know Your Customer' checks including the verification of identity and recording the details of all mortgage applicants before passing applications to The Furness.

I confirm that any information Furness Building Society holds about me and how I use the online site may be used for monitoring and management information purposes. This may be shared with the management team within my own organisation.

I indemnify Furness Building Society in respect of any liability, losses, damages or costs it may incur arising from a breach of my warranties and/or obligations, imposed by these terms of business, or by reason of any misrepresentation or negligent, or fraudulent act or default by me.

I agree to accept and comply with the Furness Building Society's Intermediary Terms of Business.

**Mortgage Broker Signature**

**Date**

  /   /



**Furness**<sup>®</sup>  
Building Society

**For more information talk to us  
on 0800 988 1561 or visit [furnessbs.co.uk](https://www.furnessbs.co.uk)**

Furness Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Furness Building Society is on the Financial Services Register under registration number 159624. The Society is covered by the Financial Ombudsman Service and has a complaints handling procedure. A copy of the complaints handling procedure is available on request. Complaints we cannot settle may be referred to the Financial Ombudsman Service. Your call may be monitored or recorded to maintain a quality service.

**Registered Office.** Emlyn Hughes House, Abbey Rd, Barrow-in-Furness, LA14 5PQ. T. 0800 781 4311 E. [furness-direct@furness-bs.co.uk](mailto:furness-direct@furness-bs.co.uk) [www.furnessbs.co.uk](https://www.furnessbs.co.uk)

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