

# sixty plus FINANCE

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Sixty Plus Finance Agency Application Form

## 1. COMPANY INFORMATION

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Business Phone \_\_\_\_\_ Fax Number \_\_\_\_\_

Email \_\_\_\_\_ Website Address \_\_\_\_\_

### LEGAL STATUS

☐ Limited Company      ☐ Partnership      ☐ Sole Trader

Trading Name \_\_\_\_\_

Limited Company Name (if different to Trading Name)

\_\_\_\_\_

Date Business Commenced \_\_\_\_\_

Date of Incorporation (if different) \_\_\_\_\_

Company Registration Number \_\_\_\_\_

Mortgage Intermediary Authorisation Number \_\_\_\_\_

Do you hold Professional Indemnity Insurance ☐ Yes ☐ No

If "Yes", please state to what amount € \_\_\_\_\_

Intermediary Status (please tick)

☐ Mortgage      ☐ Life Assurance      ☐ General Insurance

## 2. DIRECTOR/PARTNERS/PRINCIPAL DETAILS

(1) Name\_\_\_\_\_ Position\_\_\_\_\_

Telephone\_\_\_\_\_ Date of Birth\_\_\_\_\_

(2) Name\_\_\_\_\_ Position\_\_\_\_\_

Telephone\_\_\_\_\_ Date of Birth\_\_\_\_\_

(3) Name\_\_\_\_\_ Position\_\_\_\_\_

Telephone\_\_\_\_\_ Date of Birth\_\_\_\_\_

(4) Name\_\_\_\_\_ Position\_\_\_\_\_

Telephone\_\_\_\_\_ Date of Birth\_\_\_\_\_

**Have any of the persons listed above or has any organisation in which they have held a managerial position:**

Been involved in any Liquidation, Receivership, Bankruptcy, Winding-up Arrangement with Creditors or is there any such matter pending? ☐ Yes ☐ No

Been convicted of any indictable offence during the past 10 years? ☐ Yes ☐ No

Had an Agency Application declined or an appointment terminated by any company? ☐ Yes ☐ No

Been debarred from acting as an Insurance Intermediary under Section 54 or Section 55 of the Insurance Act 1989? ☐ Yes ☐ No

*If the answer to any of the above questions is "Yes" please supply full details on a separate page and include with this application.*

**Other than Directors or Principals please list mortgage sales/administration personnel:**

Name	Position Held
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

### 3. SALES DETAILS

In connection with this Agency Application please indicate estimated sales volumes for the calendar year 2007.

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### 4. BUSINESS DETAILS

Please state your core activities if Mortgage Broking is not your core business:

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Please provide contact name, address, and telephone number of referees who are familiar with your Mortgage business activity (*the necessity for these may be waived in certain instances*)

Name	Address	Telephone Number
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### 5. DECLARATION AND SIGNATURE

This section should be completed by the Managing Director, Managing Partner or Principal only.

I declare that the information given in this application is true and complete. I authorise you to make any enquiries with former employers of all the individuals named above or other such enquiries as Sixty Plus Finance deems necessary in consideration of this application for agency facilities.

Signed _____	Date _____
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Signed _____	Date _____
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Signed _____	Date _____
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To assist in this consideration of this application, the following documentation must be submitted:

- ✓ A copy of your professional indemnity insurance certificate
- ✓ A copy of your current Mortgage Intermediary Authorisation
- ✓ A copy of your current tax clearance certificate
- ✓ A full list of your mortgage introducers and copies of introducers agreements for all your introduced business

Please note that commission will be paid by cheque and posted to your business address