Individual broker registration form

For an adviser or account executive joining a firm that already holds terms of business with FDI Insura registers you as a user of the broker portal under the firm's existing agency, so it is shorter than the fi authorisation and the professional indemnity cover have already been verified. It does need a counters from someone at the firm who can authorise the access.

1 You

Full name *

Position *

Email address for the portal account *

Direct telephone *

Date you joined the firm

Individual registration number, if any

Relevant qualifications

2 Your firm

Firm name *

Our agency number, if you know it

Competent authority

Firm reference or registration number

3 Access you need

Ranges

- ☐ Investments
- ☐ Guarantees and surety
- ☐ Retirement
- ☐ Estate planning
- ☐ Workplace protection
- ☐ Home finance

Level of access

- ☐ View cases and documents
- ☐ Obtain quotations
- ☐ Submit business
- ☐ Administer other users at the firm

Anything else the desk should know

Sectors you specialise in, existing cases to transfer to your name.

4 Authorisation from the firm

A principal, compliance officer or portal administrator at the firm has to confirm the access. Online, we email them to countersign; on paper, they sign below.

Who will countersign *

Their email address *

Declaration

> The adviser named in section 1 confirms that the information given is correct and that they will use the portal only for business placed through the firm named in section 2. The firm confirms that the adviser is employed or appointed by it, is fit and proper to place insurance business, and is covered by the firm's professional indemnity insurance, and authorises the access requested in section 3.

Signed by the adviser

Name in block capitals | Signature | Date

Signed by the firm — principal, compliance officer or portal administrator

Name in block capitals | Signature | Date

Sending the form

Press the button below to send the completed form to the broker desk, or save it and attach it to your firm does not yet hold terms of business with us, use the firm accreditation form instead — open an agency.

Email the completed form

or attach it yourself to **broker.desk@fdi-insurance.eu**