

Member Engagement Form

Membership is based on the individual and not per firm
Please complete all sections in BLOCK CAPITALS

COMPANY DETAILS

Name: _____

Position: _____

Firm name: _____

Company address: _____

Postcode: _____

Telephone: _____

Mobile: _____

Email address: _____

Website address: _____

Please indicate with a tick in the box if other advisers in your firm are Members

Please tick the box if you receive support from The SimplyBiz Group

MEMBERSHIP FEES

Membership fees will be taken by Direct Debit on the 27th of each month. Tick both boxes if you require Membership and Regulatory Support. Regulatory support as part of our Membership package is only applicable to consumer credit.

Membership - £20 per month, VAT inclusive

Price maximum guarantee: Please note that Membership is for the individual and not firm. However, the maximum amount a firm will be asked to pay will be £60 per month including VAT no matter how many of their advisers become Members.

Regulatory Support - £40 + VAT per month

Regulatory support fees are applicable to a firm and are not based on any number of individuals.

ACKNOWLEDGEMENT

The Terms and Conditions for FIBA Membership can be found on the website www.fiba.org.uk. Please tick here to acknowledge you have read them.

Authorised signatory: _____

Date: _____

INFORMATION

What other business activity is your firm interested in? (One only)

Commercial Mortgages Buy to Let Mortgages

Short Term Finance Development Finance

Specialist Finance Asset Finance

Invoice Finance Vehicle Finance

Cashflow Finance

Which firm provides your Professional Indemnity Insurance - if applicable?

Provider: _____

Please provide the names of two lenders that have provided finance for you customers over the past 12 months.

First Lender: _____

Second Lender: _____

Does your firm have, or intend to have, Appointed Representatives and if so how many?

Yes No Number: _____

Does your firm employ sales personnel and if so - how many?

Yes No Number: _____

What is your firm's total number of customers?

Number: _____

How many websites does your firm currently trade from?

1 - 4 5 - 9 10 - 19

20 - 49 50+

How many employees does your firm have?

1 - 4 5 - 9 10 - 19

20 - 49 50+

What was the total amount of lending you referred in the last financial year?

Regulated: _____

Unregulated: _____



Instruction to your Bank or Building Society to pay by Direct Debit



Please complete the whole form, using a ball point pen,
and send it to:

The Financial Intermediary & Broker Association
The John Smith's Stadium, Stadium Way,
Huddersfield, HD1 6PG

Name(s) of Account Holder(s):

Bank/Building Society Account Number:

Branch Sort Code:

Name and full postal address of your Bank/Building Society:

To: The Manager	Bank/Building Society
Address	
<input type="text"/>	
<input type="text"/>	Postcode

Reference:

Service user number:

*For The Financial Intermediary & Broker Association official use only.
This is not part of the instruction to your Bank or Building Society.*

Instruction to your Bank or Building Society

Please pay The Financial Intermediary & Broker Association Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with The Financial Intermediary & Broker Association and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)

Date

Banks and Building Societies may not accept Direct Debit instructions for some types of account.

DDI15/15

This guarantee should be detached and retained by the payer.

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit The Financial Intermediary & Broker Association will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request The Financial Intermediary & Broker Association to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by The Financial Intermediary & Broker Association or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when The Financial Intermediary & Broker Association asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.