



Registered office: Simply Biz Services Limited (company no: 04590781), Fintel House, St Andrew's Road, Huddersfield HD1 6NA. Tel: 01484 439128 [www.simplybiz.co.uk](http://www.simplybiz.co.uk)

Terms first expressed in italics shall have the meaning prescribed to them in the standard terms and conditions for the supply of compliance and business support services (Conditions) at [www.simplybiz.co.uk/member-terms](http://www.simplybiz.co.uk/member-terms)

**1. YOUR CONTACT DETAILS ('YOU')**

Name:		Firm name (or trading style):	
Business address:			
		Postcode:	
Telephone:		Mobile:	
Email address:		Website address:	

**2. SUBSCRIPTION SERVICES REQUIRED**

(please tick one as appropriate, full details of the Services can be found in the Directory of Services at [www.simplybiz.co.uk/directoryofservices](http://www.simplybiz.co.uk/directoryofservices))

<input type="checkbox"/>	<b>Core</b>	Subscription Charges are calculated as 2.5% of your Turnover (as specified below or as amended from time to time) subject to a minimum payment of £265.76 and a maximum payment of £911.06 (Subscription Charges Limits)
<input type="checkbox"/>	<b>Mortgages</b>	Subscription Charges are calculated as 1% of your Turnover as updated from time to time subject to a minimum payment of £208.84 and a maximum payment of £911.06 (Subscription Charges Limits)
<input type="checkbox"/>	<b>FCA Authorisation Service (IFA)</b>	£150 per month until authorised by the FCA when your Subscription Charges will be automatically revised to a sum equal to 2.5% of your Turnover as updated from time to time subject to a minimum payment of £265.76 and a maximum payment of £911.06 (Subscription Charges Limits)
<input type="checkbox"/>	<b>FCA Authorisation Service (Mortgages)</b>	£150 per month until authorised by the FCA when your Subscription Charges will be automatically revised to a sum equal to 1% of your Turnover as updated from time to time subject to a minimum payment of £208.84 and a maximum payment of £911.06 (Subscription Charges Limits)
Annual turnover or gross income from all sources (actual or estimated, including recurring income)		£
Special terms: *Subscription Charges will increase by 5%, or the prevailing inflation rate (whichever is higher), on the 1st January of each year.		

**3. ADDITIONAL SERVICES** (without prejudice to the definition of Additional Services as specified in the Conditions, the following services will also be treated as Additional Services for the purposes of the Agreement)

Additional Services required	Quantity	Frequency**	Charges per month	Payment Date
			£	
			£	
			£	
			£	
			£	
			£	

**Special terms:** \*\*Where an Additional Service is purchased on a "per Year" basis, if you do not take up any such Additional Services allocated in any Year within 90 days of the end of the relevant Year, such Additional Services will automatically lapse and may no longer be taken up in any subsequent Year.

4. SIMPLY PROTECT SERVICES

Please tick if you wish to be considered for Simply Protect Services

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For clarification, Simply Protect Services are provided subject to due diligence checks and subject to separate terms and conditions. Our onboarding team will be in touch with you. Please note that Simply Protect Services will only be made available to you in the event that your due diligence is approved by the onboarding team and you have accepted the terms and conditions relating to Simply Protect Services.

5. THIRD PARTY SERVICES (please note - these are subject to additional terms of use - our onboarding team will be in touch to agree these with you – for clarification you will not have access to or be charged for any Third Party Services until you agree to the additional terms of use relating to them)

Third Party Services	Quantity	Frequency	Cost per month (ex VAT)
			£
			£
			£
			£
			£
			£

6. CHARGES (EX VAT)

Subscription Charge per month (ex VAT)	Additional Services cost per month (ex VAT)	Third party charges (ex VAT)	Total cost to you per month (ex VAT)
£	£	£	£

7. INFORMATION ABOUT YOUR FIRM (please complete and tick as appropriate)

Current Status:	<input type="checkbox"/> Appointed Representative			<input type="checkbox"/> Directly Authorised	<input type="checkbox"/> Adviser
	Network:		Service provider:		Firm:
Current permissions: (please tick all that apply)	<input type="checkbox"/> Investment		<input type="checkbox"/> Pension		<input type="checkbox"/> Mortgage
	<input type="checkbox"/> Protection		<input type="checkbox"/> General insurance		
No. of advisers:	RIs		Mortgage, protection and GI only		
	Consumer credit		PMI only		
Current Advice status: (only if applicable)	<input type="checkbox"/> Independent <input type="checkbox"/> Restricted				
FCA number: (if Directly Authorised)					

8. KEY TERMS - THE FOLLOWING SPECIAL TERMS APPLY TO THIS ENGAGEMENT DOCUMENTATION

Minimum Payment Term	For Subscription Charges - Twelve months For Additional Services – Additional Services purchased on a “per Year” basis have a minimum term of twelve months. All other Additional services are subject to a 30-day rolling contract. For Third Party Services -As specified in the terms of use
Effect of termination	In the event the membership Agreement is terminated for any reason, the provisions of Clause 8.15 will apply to both the Subscription Services and the Additional Services outlined in this Instruction and we will be entitled to request payment by your usual payment method (or by any other payment method reasonably required by us) for all sums that you owe to us under this Instruction which have not yet been paid.
Payment Date	For Subscription Charges – 27th of each month For Additional Services – As specified in section 3 of this Engagement Document For Third Party Services - As specified in the relevant terms of use
Notice Period	Six months (The Notice Period will commence and become effective no earlier than the expiry of the Minimum Payment Term)
VAT	Any sum payable under the Agreement is exclusive of VAT which will be payable in addition to that sum in the manner and at the rate prescribed by law from time to time.

9. DECLARATIONS

1. I have read and agree to the Conditions found at [www.simplybiz.co.uk/member-terms](http://www.simplybiz.co.uk/member-terms) and have the authority to act on behalf of the firm as its authorised signatory.

2. I accept the Special Terms specified within this Engagement Documentation and agree to the Special Terms and the Conditions governing this Engagement Documentation.

3. I agree for my agencies to be aligned with SimplyBiz in order to receive enhanced commissions through Simply Protect. (Directly authorised firms only)

4. I agree that this Engagement Documentation will act as my formal authority, for SimplyBiz to request information from my accountant, or any product provider or mortgage lender (if applicable) with whom I have an account.

Additional information (if applicable):

Your Signature:

Position in firm:  
(Principal/Director/Partner/Other)

Date:

SimplyBiz Services Ltd will hold information about you and your dealings with us on our database for the purposes of: administering our services, maintaining our relationship, including providing a more personal level of service to you; improving customer care, research and analysis, marketing our own products and services, legal and regulatory reasons. We will retain information for a reasonable period, and we may share information about you for the purposes listed above (in the UK and abroad). By providing us with the relevant contact details for fax, mobile phone and email you consent to contact by these methods. Full details on how we use and process your data can be found at [www.simplybiz.co.uk/member-privacy-notice](http://www.simplybiz.co.uk/member-privacy-notice)

Additional Advisers and Key Personnel

Please ONLY complete this section if additional logins are required for our Member website, and so that those listed can receive essential information and bulletins etc from us.

Name (forename and surname)	Position in firm	Email address	Contact number

Additional information (Office use only – please do not complete)

Regional Sales Manager:

Recruitment Support Adviser:

Member Get Member referee:

Commencement date for Direct Debit:     /     /

# Direct Debit Mandate

Instruction to your Bank or Building Society to pay by Direct Debit.  
Please fill in all details and return to:

Simply Biz Services Limited, Fintel House, St Andrew’s Road,  
Huddersfield HD1 6NA



Originator's Identification Number

8	1	4	6	9	7
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<b>1. NAME AND FULL POSTAL ADDRESS OF YOUR BANK OR BUILDING SOCIETY</b>																	
To: The Manager		Bank/Building Society															
Address:																	
Postcode:																	
<b>2. NAME OF ACCOUNT HOLDER(S)</b>																	
<b>3. BRANCH SORT CODE</b>	<b>4. ACCOUNT NUMBER</b>	<b>5. REFERENCE NUMBER</b>															
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<b>6. INSTRUCTIONS TO BANK OR BUILDING SOCIETY</b>																	
Please pay to Simply Biz Services Limited, Direct Debit from the account detailed on this instruction subject to the safeguards assured by the Direct Debit guarantee. I understand that this instruction may remain with Simply Biz Services Limited and, if so, details will be passed electronically to my Bank/Building Society.																	
Signature:	Signature:																
Print name:	Print name:																
Date of Signature:	Date of Signature:																
BANKS AND BUILDING SOCIETIES MAY NOT ACCEPT DIRECT DEBIT INSTRUCTIONS FOR CERTAIN TYPES OF ACCOUNTS																	

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



1. If there are any changes to the amount, date or frequency of your Direct Debit Simply Biz Services Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Simply Biz Services Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
2. If an error is made in the payment of your Direct Debit, by Simply Biz Services Limited 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.
3. If you receive a refund you are not entitled to, you must pay it back when Simply Biz Services Limited asks you to.
4. 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.