

Registered office: SimplyBiz Services plc, The Galpharm Stadium, Stadium Way, Huddersfield, HD1 6PG. Registered in England No. 4590781.
T: 01484 439121 **F:** 01484 439101 **E:** recruitment@SimplyBiz.co.uk **W:** www.SimplyBiz.co.uk

Your contact details

Name:		Firm name:	
Company address:			
		Postcode:	
Telephone number:	Mobile number:	Fax number:	
Email address:		Website address:	

Your company details

No. of RIs:	IFA only: <input type="checkbox"/>	IFA & Mortgages: <input type="checkbox"/>	Mortgages/GI only: <input type="checkbox"/>
Estimated turnover for last 12 months: £	Date of financial year end: / /		
Name & address of accountant:			
			Postcode:
Appointed Representative <input type="checkbox"/>	Current Network:	Directly regulated <input type="checkbox"/>	Current service provider:

(This Engagement Form will act as formal authority for us to approach your accountant).

Level of service required (please tick as appropriate)

Core Service PLUS Service Mortgage/GI Only available to intermediaries with permissions in mortgages, GI and protection only.

Additional information (please tick as appropriate)

Commencement date for Direct Debit: 27/ / (27th of next month)

I agree for my existing agencies to be attached to SimplyBiz in order for me to receive the enhanced commission rates (only applicable to firms that are currently directly authorised). Yes No

I acknowledge receipt of the SimplyBiz brochure.

I agree that this Engagement Form will act as formal authority for SimplyBiz to request information relating to the firm from my accountant and any product provider with whom the firm has an account, and I authorise the giving of such information.

Name of SimplyBiz BDM:	1 to 1: <input type="checkbox"/>	Workshop: <input type="checkbox"/>	Direct: <input type="checkbox"/>	Tel: <input type="checkbox"/>
Your Signature: X	Date:			

SimplyBiz Services plc 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 & 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.

Direct Debit Mandate - Instruction to your Bank or Building Society to pay by Direct Debit.

Please fill in all details and return to: SimplyBiz Services plc,
The Galpharm Stadium, Stadium Way, Huddersfield, HD1 6PG.



Originator's Identification Number

8 1 4 6 9 7

1. NAME AND FULL POSTAL ADDRESS OF YOUR BANK OR BUILDING SOCIETY

To: The Manager

Bank/Building Society

Address: Postcode:

2. NAME OF ACCOUNT HOLDER(S):

3. BRANCH SORT CODE

4. ACCOUNT NUMBER

5. REFERENCE NUMBER

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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6. INSTRUCTIONS TO BANK OR BUILDING SOCIETY

Please pay to SimplyBiz Services plc, 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 SimplyBiz Services plc and, if so, details will be passed electronically to my Bank/Building Society.

Signature: X	Signature: X
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.

- If there are any changes to the amount, date or frequency of your Direct Debit SimplyBiz Services plc will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request SimplyBiz Services plc 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 SimplyBiz Services plc 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 SimplyBiz Services plc 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.