



Intermediary registration form

Using the editable fields?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

With this form you can:

- register your details with the following 'Providers':
 - Quilter Investment Platform Limited
 - Quilter Life & Pensions Limited

We regularly update our forms; you can confirm that this September 2023 version is the latest by checking on our website quilter.com

Completing this form

- Tick/complete this form, as applicable, using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- **Please attach a sheet of your firm's letterhead to this form.**

Send your completed form as follows:

- **By post** - to Quilter, FAO Adviser Servicing, Quilter, SUNDERLAND, SR43 4JP.
- **By email** - to ask@quilter.com
- **By fax** - to 023 8048 1454

1. Intermediary details

Name of firm

Trading name

(If different from above)

Address

Postcode

Telephone number

Fax number

Email address

Website

Type of firm ▶ *Please tick/complete as applicable*

Limited company

Registered number

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Sole trader

Partnership

Limited Liability Partnership

Full names of managing director, directors, partners or principal

Have the directors, partners or principal been associated with an intermediary which has registered to place business with any of the Provider companies?

No

Yes ▶ *Please give details. Continue on a separate sheet if necessary*

