

User Information

We use this information to create your account and website login. This is normally the information of the primary contact within the business or the person whom will be looking after the site. Your account information will be sent to you in your welcome email once the site has been built.

Name

Position

Telephone

Mobile

Email

Declaration

- i) Please provide me/us with the selected service
- ii) I/we have read and agree to the Terms of Business published at <http://www.adviserportals.co.uk/about-us/terms-of-business/>
- iii) A completed direct debit mandate is also attached
- iv) Prices may be subject to change inline with annual RPI

Signature

Print Name

For & on behalf of

Position

Date

Business Information

Business Name

Address

Postcode

Telephone

Fax

Email

Legal Status

Business Type

Country of Reg.

Company No.

Registered Office

VAT Number

FCA Number

Regulation and Compliance

Please choose which areas of advice you offer from the selection below. (* Not available on mortgage only sites).

Business Protection
 General Insurance
 Corporate *
 Estate Planning *
 Equity Release *

Life Insurance
 Mortgages
 Healthcare *
 Investments *
 Pensions *

Network/Compliance Service Provider

Mortgage Fee Structure (If applicable)

Website Information

Products Please choose which products you would like from the selection below. (* Not available on mortgage only sites).

Articles
 Calculators
 Research Links

Contact Forms *
 Newsfeeds *
 Wraps *

Logo/Corporate Colours

Please send a copy of your corporate logo in jpeg, gif or png format to design@adviserportals.co.uk and provide details of your corporate colours below.

Website Theme

Please tell us which design you wish to use. Current options can be found on our website: www.adviserportals.co.uk/websites/examples/

Domain (URL)

Please tell us which domain you wish to use with your website. Details on how to use this with your site will be emailed to you once your site has been built.