



This form is to be used by Professional Introducers only.

A professional introducer is somebody who works for a firm that is authorised and regulated by the Financial Conduct Authority and has the authority of that firm to agree and bind the firm to the terms and conditions of an Introducer's Agreement. This form is not an Introducer's Agreement.

This form is not a formal agreement between your firm and ours. It does not commit you to refer your customers to us, nor commit us to accepting that referral. It will enable us to discuss the specific case with you and see if it is mutually beneficial to do business. To that end we will rely on the information you provide. This form will also enable us to comply with our regulatory obligation of conducting due diligence on referring firms.

Details of Final Salary Pension

Final Salary Provider:	
Member's Name:	
Pension Provider Address:	
Estimated Value:	
Service Wanted : Please let us know if there is anything particular wanted with the Final Salary advice service.	

Due Diligence

We have a regulatory obligation to perform due diligence checks on professional introducers before we are able to accept business from them. The information requested below will enable us to satisfy this objective.

If you answer 'Yes' to any question in a blue box please give full details.

Name of Firm:	
FCA Firm Reference Number (FRN) :	
Has this Firm been trading for LESS THAN 5 years under the same FRN:	
Your Name:	

Contact Details: Phone and Email	
Firm Website:	
Does your firm hold Pension Transfer Permissions:	
If 'YES' why do you want to use our service	
Please give information on how you obtain your clients. E.g. are they personally known to you, are they via lead generation services, etc.	
Have you or your firm ever been subject to any sanction, fine or any other supervisory action from the regulator	
Have you ever been subject of a Section 166 review	

Once completed please send this form to us using any of the methods below :

Email : help@best-pension-annuity.co.uk

Fax : 0871 277 1422

Address: The Old School House, East End Road, Bradwell-on-Sea, Essex, CM0 7PY

On receipt, you will be contacted by a member of the pension transfer team to discuss your case.