

# Sesame Mortgage Network

## Application for Mortgage Point of Sale System (The Key)

By completing this application form you are applying for access to Sesame's Mortgage Point of Sale System (The Key).

### Application Queries

If you have any queries when completing this application form please refer to the guidance notes on page three or alternatively contact us.

By email: [pos@sesame.co.uk](mailto:pos@sesame.co.uk)

By telephone: 0845 122 1515 then ask for the Mortgage Desk

### Application Submission

Please return this form:

By post to: POS Application, Mortgage Desk, Sesame Ltd, Independence House, Holly Bank Road, Huddersfield, HD3 3HN

By fax to: 0870 238 7160

### IMPORTANT INFORMATION

THE PRINCIPAL OF THE APPLICANT FIRM MUST COMPLETE AND SIGN THIS FORM.

#### 1. Firm Details

All information is mandatory.

<b>Firm Name</b>	
<b>Firm master agency number</b>	
<b>FSA number</b>	
<b>Contact name</b>	
<b>Contact telephone number</b>	
<b>Firm address</b>	

#### 2. System Administrator Details

You need to nominate a dedicated individual within your firm as a System Administrator. The System Administrator will be responsible for setting up all other users within your firm.

<b>Salutation</b>	Mr / Mrs / Ms / Miss	<b>Other</b>	
<b>First Name</b>			
<b>Surname</b>			
<b>Job title</b>			
<b>E-mail address</b>			
<b>Contact telephone number</b>			

### 3. Mortgage Sourcing

The Key is fully integrated with Mortgage Brain Premier and Trigold Prospector. This integration enables client data and fact-find information to be automatically incorporated into both sourcing systems reducing the need to re-key information.

As part of this agreement, Sesame will, subject to the terms and conditions below, provide your System Administrator with a fully funded mortgage sourcing licence, provided they are authorised to advise on mortgages. Please provide the following information:

Authorised for mortgages?	Yes / No
If yes, which sourcing option?	Mortgage Brain / Trigold

#### Additional Mortgage Sourcing Licences

Subject to the terms and conditions below, Sesame will fully fund the cost of mortgage sourcing system licences for any individuals in addition to the System Administrator named above. The additional licences will only be provided for these individuals **once user accounts have been created and they have downloaded and installed The Key software. Once this has been done, you will need to complete "The Key additional sourcing licences application form" and submit it to Sesame using the appropriate contact details provided.**

#### Next Steps

Following receipt of this form we will process your application and, if successful, we will provide the System Administrator with log in details, an installation guide and a link to download and install the software.

Once we have activated your account for The Key, we will issue you with the application form for requesting additional funded mortgage sourcing licences.

#### Terms and Conditions

Sesame will pay the monthly fees due for your use of Sesame's version of The Key software ("The Key") subject to you meeting the following conditions:

- Your firm is registered with Sesame to provide Mortgage, Protection and / or GI advice
- Your firm generates a minimum of £5,000 combined Mortgage, Protection and / or GI commission over the most recent 12 months of your network membership.

We may check your firm's commission levels for these types of business from time to time to verify whether your firm continues to generate this level of commission. We may check your firm's and its Registered Individual's usage of The Key from time to time to verify whether users are actively using The Key. If you fail to satisfy the above conditions, or if we believe that the Key is not being used, Sesame reserves the right to withdraw funding of the monthly fees for the next and subsequent months and you will have to pay the monthly fees yourself.

Sesame will pay the cost of one licence for either the Mortgage Brain or Trigold sourcing software per eligible Registered Individual in your firm provided that:

- The advisers from your firm are Registered Individuals of the Sesame network (the "Network") and are authorised by the Network to conduct mortgage business; and
- The advisers from your firm have registered to access the Mortgage Brain or Trigold sourcing software **and** The Key from Sesame.

**If you fail to satisfy the above conditions, or if we believe that the Key is not being used in conjunction with either of the sourcing softwares, Sesame reserves the right to withdraw funding of the monthly fees for these sourcing licences for the next and subsequent months and you will have to pay the monthly fees yourself.**

Your signature on this application form signifies your intention to be bound to receive the services subscribed for in it. Access to The Key and / or Mortgage Brain or Trigold sourcing software is provided to you as part of, and subject to, the terms of your membership of Sesame Limited's adviser network.

**Signed for and on behalf of the above applying firm by:**

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**Name and title (print)**

**Date**

## Guidance Notes

This document includes guidance notes on how to complete the associated application form and what information to provide.

### 1. Firm Details

This information will be used in creating your firm profile within The Key. It is essential that you provide us with accurate information.

<b>Firm Name</b>	The firm's FULL name, this should be the registered name of your business
<b>Firm master agency number</b>	The Sesame master agency reference number for your firm
<b>FSA number</b>	The firms FSA number <b>not</b> Sesame's FSA number
<b>Contact name</b>	A main contact for your firm
<b>Contact telephone number</b>	The main contact telephone number for your firm
<b>Firm address</b>	The firm's FULL address

### 2. System Administrator Details

This information will be used in creating the User Profile within The Key of your System Administrator, who in turn will be responsible for creating all subsequent user profiles for other members of staff within your firm.

<b>Salutation</b>	The salutation of the individual who will be your System Administrator for the Key
<b>First Name</b>	The forename of the individual who will be your System Administrator for the Key
<b>Surname</b>	The surname of the individual who will be your System Administrator for the Key
<b>Job title</b>	The job title of System Administrator
<b>E-mail address</b>	A contact e-mail address for your System Administrator
<b>Contact telephone number</b>	A contact telephone number for your System Administrator

### 3. Mortgage Sourcing

This information will be used to determine whether the system administrator is entitled to free mortgage sourcing and their preferred mortgage sourcing system.

<b>Authorised for mortgages?</b>	Whether the System Administrator is authorized to advise on mortgages
<b>If yes, which sourcing option?</b>	If the System Administrator is authorized to advise on mortgages, which sourcing option would they require