

# 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).

### New Network Firms

If you are a new firm joining the Network after the 1<sup>st</sup> November 2009, and are authorised for Mortgages & General Insurance only, then as part of your Network agreement the Key is mandated and must be used in accordance with the 'Appropriate Usage' criteria outlined below.

### 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

### Application Submission

Please return this form:

By post to: POS Application, 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

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 one mortgage sourcing licence for **additional registered individuals with mortgage permissions**

#### 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.

#### 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
- Your firm and its registered advisers ensure that there is 'appropriate' usage of The Key

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; and
- The advisers from your firm ensure that there is 'appropriate' usage of The Key

#### Appropriate Usage

'Appropriate usage' can be defined as recording all mortgage & GI clients on the Key, including completion and storage of all advice process documentation within the Key. Users are also required to ensure that product and sales related data and documentation is held within The Key and that electronic new business submissions to Sesame are transmitted via The Key.

#### Principal Signature

**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. Please note, that in accordance with your membership agreement, Mortgage and General Insurance only firms that joined after the 1<sup>st</sup> November 2009 are contractually required to use The Key and may face further action in failing to use the software appropriately.**

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