

Introducer Name	Title:	Forename(s):	Surname:
Introducer's Home Address			
	Postcode		
Date of Birth			
	Town of Birth (for security purposes)		
Business Name			
Nature of Business <small>e.g. financial adviser, mortgage broker, estate agent</small>			
Business Address			
	Postcode		
Business Tel. No.		Business Fax No.	
Email address			
FSA Register Number			
Do you wish to be registered to submit E-commerce approvals in principle and applications? (see below for terms and conditions)	Yes		No
What is your Regulatory status? e.g. Directly Authorised, Appointed Representative (AR)			
What Regulatory Mortgage Permissions do you hold?	<input type="checkbox"/> Advising on regulated mortgage contracts <input type="checkbox"/> Arranging (bringing about) regulated mortgage contracts		
If Appointed Representative:			
	Principal Firm Name		
	Contact		
	Telephone No.		
	Principal Firm address		
	Postcode		
	Principal Firm FSA Register No.		
	What Regulatory Mortgage Permissions do you hold?	<input type="checkbox"/> Advising on regulated mortgage contracts <input type="checkbox"/> Arranging (bringing about) regulated mortgage contracts	

Yorkshire Building Society, which is authorised and regulated by the Financial Services Authority, chooses to introduce its customers to:

- Legal & General for the purposes of advising on and arranging life assurance and investment products bearing Legal & General's name; and
- Homeowners Friendly Society for the purpose of arranging stakeholder Child Trust Funds

All communications with us may be monitored/recorded to improve the quality of our service and for your protection and security.

TERMS AND CONDITIONS OF THIS SERVICE

- You will comply with all terms and conditions set out on our website, and any changes we apply to them.
- You undertake to keep any passwords giving access to our system safe and secure and not to disclose them to anyone not authorised by us. If someone else becomes aware of your password, you must change it immediately.
- You will act in accordance with the provisions of the Data Protection Act 1998, in particular you will ensure that the customer consents to all processing of their personal data by us and by our credit reference agencies and that you have the customer's authority to complete the application.
- We may terminate your authority to use our system at any time.
- You agree to indemnify us in full for any breaches of these terms and conditions.
- You will not submit any application on behalf of an unauthorised person or firm.

DATA PROTECTION

HOW YOUR PERSONAL INFORMATION WILL BE USED

- We will use your personal information together with other information available to manage your business relationship with us, for fraud prevention and detection, legal and regulatory compliance, and market research.
- If you choose to provide the additional personal information (Home Address and Date of Birth) we will use it to remove duplicate records from our database. Your personal details will be treated as confidential and will not be used to contact you in relation to business matters.

You have a right of access under The Data Protection Act to your personal records held by the Society, subject to the payment of a fee. A Subject Access Request Form (YBS39) can be obtained from any branch or from Yorkshire Building Society, Yorkshire House, Yorkshire Drive, Bradford, BD5 8LJ. You have the right to have any inaccuracies corrected.

If you have personal accounts with us and have told us you do not wish to receive marketing material we will continue to respect your wishes.

Consent

I agree to the processing of my personal information as explained on this form and to be bound by the Terms and Conditions stated above.

Name _____

Signed _____

Date _____

For Branch Use Only

Completed by _____ Position _____ Date _____

Declaration for staff completing form over the telephone.

This form was completed over the telephone. I have explained the use that will be made of the personal data and the introducer has given their consent.

Reason for introducer using Yorkshire Building Society branch:

Local introducer not dealing with IAM and confirmed with IAM

Agreed with IAM

YBS Agent

_____ IAM Name

After completing this form, please fax it to Retail Operations.

For Head Office Use Only (complete all boxes in all cases)

Checked for duplicate database record

Checked agreement with IAM

New record declined/created with Party Systems ID

Completed by _____ Position _____ Date _____