



AGENCY APPLICATION FORM

General Details

FULL TRADING NAME	
TRADING ADDRESS	
NATURE OF TRADING (Sole Trader, Private Ltd Company, etc.)	
DATE COMPANY ESTABLISHED	
TELEPHONE NUMBER	
EMAIL ADDRESS	
COMPANY WEBSITE ADDRESS	
COMPANY REGISTRATION NO.	
FCA NUMBER	
ARE YOU A MEMBER OF A TRADE ORGANISATION (i.e. BIBA)	
MEMBERSHIP NO.	


Details of Directors/Owners/Shareholders

Name	Position	Years associated with firm

Accounts Details

BANK NAME & ADDRESS	
TYPE OF ACCOUNT (Statutory, Non-Statutory, etc.)	
ACCOUNTS CONTACT NAME	
ACCOUNTS CONTACT EMAIL ADDRESS	

Governance & Oversight

To provide the agreed level of oversight as instructed by insurers please register your company for free with Regulator Efficiency Gains at; www.reg.uk.com	
Please tick box to confirm you have registered with R.E.G.	<input type="checkbox"/>
Insurers request we note what fees our broker partners charge their clients in respect of each transaction. Please confirm in the spaces provided;	New Business
	Renewal
	MTA
	Cancellation

Have you, or in the case of a company, LLP or partnership any of the directors/partners/shareholders or owners of the company;

Been declared Insolvent?	
Been declared Bankrupt?	
Been subject to any disciplinary procedures instituted by any regulatory or professional body?	
Ever been convicted of a criminal offence, other than motoring, not treated as spent under the Rehabilitation of Offenders Act 1974?	
Ever been disqualified under Company Law?	
Had any claim made against your Professional Indemnity insurance in the past 5 years? If yes, please give details on last page.	

GDPR

Please tick the box to confirm you are happy to receive communications from us in respect of the policies and services available from us	
--	--

Declaration:

I/We confirm the above statements and particulars are true. In the event such facilities being granted I/We undertake to observe and abide by the Terms of Business Agreement and to give immediate notice and appropriate details should any of the disclosed information change;

Signature	Date
Print Name	Position

Do you qualify to have an Agency with Ratcliffes?

To become an agent with Ratcliffe Underwriting you need to;

- Have practiced in general insurance for at least five years
- Have been operating as a business for at least two years
- Operate from professional offices
- Be FCA registered and approved
- Hold a relevant Consumer Credit Licence and maintain ICO Registration
- Hold adequate Professional Indemnity cover – Please attached copy of certificate
- Submit your latest audited accounts
- Register with Regulatory Efficiency Gains (R.E.G.)

If you need to provide any additional information as a result of any of the questions answered above please use the following space;

M R Ratcliffe Consultants Ltd t/a Ratcliffe Underwriting

Wolseley House, Oriol Road, Cheltenham, Gloucestershire, GL50 1TH

T: 01242 544544

e: insure@ratcliffes.co.uk

www.ratcliffes.co.uk