

# Introducer Pack

**COUNTRYWIDE**  
MONEY *compare*



**This agreement** is made between Countrywide Money “the broker” and an agent “the agent” and shall take effect from the date on which the agreement is signed by the broker [see below]

**Recitals:**

- (A) The Agent has agreed to refer to The Broker leads for Mortgages, Loans, and Life & Home Insurance, which the Broker will deal with personally in return for payment of a commission to the Agent.
- (B) The parties have agreed that the reference of such leads and the payment of commission shall be governed by the terms of this agreement.

**1. Obligations of the Broker**

- 1.1. The Broker agrees to refer leads received under this agreement to a nominated Finance provider with a view to procuring an agreed level of cover or finance for the client.
- 1.2. The Broker shall pay the Agent a commission in accordance with the provisions of the schedule or in accordance with such other commission rates as agreed in writing from time to time by the parties.
- 1.3. The Broker shall provide full details of progress relating to any leads provided by the Agent at any time requested by the same Company.
- 1.4. The Broker agrees to hold and process any of the data received from the Agent under the provisions of the Data Protection Act 1998.

**Obligations of the Agent**

- a. The Agent agrees to refer leads to the Broker for the purpose of obtaining Life insurance advice for the clients.
- b. The Agent confirms that all leads are legally owned and agrees to provide evidence of ownership if deemed necessary.
- c. The Agent agrees to provide the leads to The Broker in such a format as will enable the Broker to attain the service levels. Format to be by Hot Key Telephone Transfer and email and must contain customer contact details including contact telephone number.



### Commission Rates & Schedule

1. The Broker will pay the Agent the commission in respect of each transaction completed as follows:
2. **20% of all NET** income generated from Mortgages, Loans, Pensions, Life and Home Insurance fees from the individual leads passed from the agent on a non-indemnity basis with the Agent agreeing not to re-market any data passed to the Broker for Mortgages, Loans, Life Insurance, Critical Illness or General Insurance business, or pass the data to any 3<sup>rd</sup> party, for a period of 4 years beginning at the date of each individual client transaction.
3. Payments of all commission due will be paid to the agent on or before the end of every month following the completion date of the insurance, Loan or mortgage agreement.
4. The Broker will maintain a record of all transactions and will supply the Agent with a statement showing details of all commission payable to the Agent no later than 7 working days after the month end in which the insurance agreement is completed.
5. Commission payable under this agreement shall be exclusive of VAT.

**The agreement shall be terminated at any time by either party giving one month written notice to that effect. Termination of the agreement will not affect the rights or obligations of either party in respect of business already completed by the firm.**

### Service Level Agreements:

1. All leads to have attempted contact within 24 Hrs of receipt.
2. Progress report to be produced and forwarded to the Agent detailing progress and status of all ongoing lead at an agreed frequency.
3. A monthly report to be produced with commission statement of number of leads paid out (Nil returns not produced).

#### The Introducer Declaration:

I/We agree to be bound by the above terms

Signed: \_\_\_\_\_

Print Name: \_\_\_\_\_

Address: \_\_\_\_\_

#### Countrywide Money Declaration:

I/We agree to be bound by the above terms

Signed: \_\_\_\_\_

Print Name: \_\_\_\_\_

Address: Challenge House, Sherwood Drive  
Bletchley, Milton Keynes MK3 6DP  
T: 08001953757  
Email: info@countrywidemoney.co.uk



## Registration Form

Name: <input style="width: 95%;" type="text"/>	DOB: <input style="width: 95%;" type="text"/>
Address: <input style="width: 95%; height: 40px;" type="text"/>	Tel: <input style="width: 95%;" type="text"/>
Post Code: <input style="width: 95%;" type="text"/>	Fax: <input style="width: 95%;" type="text"/>
	Mob: <input style="width: 95%;" type="text"/>
	Email: <input style="width: 95%;" type="text"/>

Are you interested in referring	Y	N	Are you interested in referring	Y	N
A: Pension Review?			F: Income Protection?		
B: Mortgage / Remortgages?			G: Debt Management?		
C: Home Insurance?			H: Asset Finance?		
D: Life & Critical Illness Insurances?			I: Equity Release?		
E: Loans?			J: Business Utility Switching?		

<b>Bank Account Details – For Your Commission Payment</b>			
Bank: <input style="width: 95%;" type="text"/>	SORT: <input style="width: 95%;" type="text"/>		
Account Name: <input style="width: 95%;" type="text"/>	Account No: <input style="width: 95%;" type="text"/>		
<b>Remember to sign &amp; return the Introducer Agreement</b>			
Introducer Name: <input style="width: 95%;" type="text"/>			
Introducer Signature: <input style="width: 95%;" type="text"/>	Date: <input style="width: 95%;" type="text"/>		



## Submitting Enquiries

1. Choose the relevant Enquiry Form from [www.countrywidemoney.co.uk](http://www.countrywidemoney.co.uk)

(A) Enter the **INTRODUCER** section via button on the homepage

(B) At the bottom of the introducer page, select relevant Online Enquiry Form.

### 2. **Submit a case**

(A) **Select and download required form**, from our stationery cupboard below.

(B) Save Enquiry Form onto your desktop,

(C) Complete Enquiry form saved on your desktop with your client,

(D) Save again after completion on desktop and attach to your email and send to:[info@countrywidemoney.co.uk](mailto:info@countrywidemoney.co.uk)  
Or

Print and post enquiry form to: **Countrywide Money, 7\ U`Yb[ Y`<ci gYŽG\ Yfk ccX`8 f]j Yž6`YHW`Ynž**

.....**A]tcb?YmbYg:A?' \* 8 D**

### 3. **Track Cases**

To track your cases, please email us via [info@countrywidemoney.co.uk](mailto:info@countrywidemoney.co.uk) with your client's name and case details and we will provide you with an update on your submitted case.

### 4. **Completion**

(A) You will be notified of progress and completion

(B) You will be paid directly within 48hours of receipt of funds from the lenders



### **Introducer Registration – Submission Checklist**

Complete Registration

Sign Agreement

**Return all 3 to:**

[info@countrywidemoney.co.uk](mailto:info@countrywidemoney.co.uk) [must contain signatures where required]

OR

Mail us at:

**Countrywide Money**

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**Dear Countrywide Money Introducer**

Many thanks for downloading our introducer registration pack. You are few steps away from being able to earn competitive commissions for referrals and introductions across a wide range of financial services products.

Enclosed within the pack are:

- **Registration Form**
- **Our Introducer Agreement**
- **A guide on how to Submit Business to Countrywide Money and start earning**
- **Key Contact details**
- **Submission Sheet**

**Your next steps?**

- Complete the registration form
- Email or post the following documents: **a.** Registration Form , **b.** Agreement

**To:** [info@countrywidemoney.co.uk](mailto:info@countrywidemoney.co.uk)

**Or: Countrywide Money**

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We will then assess your application and when your registration is approved, we will return a signed copy of the Agreement. If you have any questions or having problems downloading or viewing the documents, please contact us on: **0800 195 3757**.

We look forward to a successful business relationship.

Yours Faithfully

Countrywide Money Team

CONTACT US  
Call: 0800 195 3757  
Email: [info@countrywidemoney.co.uk](mailto:info@countrywidemoney.co.uk)  
[www.countrywidemoney.co.uk](http://www.countrywidemoney.co.uk)

POSTAL ADDRESS  
Countrywide Money Ltd  
Challenge House,  
Sherwood Drive,  
Bletchley, Milton Keynes  
MK3 6DP

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