

Agency Application Form

Please complete and send to agency@pib-insurance.com

Company Details			
1.	Full company name including trading name(s)		
	Company registration number		
	Name of regulator		Reference number
	Type of legal entity	Private <input type="checkbox"/> Public limited company <input type="checkbox"/> Partnership <input type="checkbox"/> Sole trader <input type="checkbox"/> Other (please specify) <input type="checkbox"/>	
	Registered Office address		
	Website		

Details of Sole Traders, Principals, Partners or Directors			
	Name	Date of birth	Company shareholding Professional qualifications
2.			

Trading Office(s)			
3.	Trading office address(es) if different from the Registered Office address		
	Contact Name		
	Telephone	Email address	

Accounts Department Contact Details			
4.	Address		
	Contact Name		
	Telephone	Email address	

Morton Michel Limited
 6th Floor, Knollys House, 17 Addiscombe Road, Croydon CR0 6SR
mortonmichel.com

Bank Account Details	
5.	Bank Name
	Account Number
	Sort Code
	Account Name
	Is this a trust or non-statutory trust account containing funds separate from your or your AR's own funds?

Professional Indemnity Insurance Details	
6.	Name of insurer(s)
	Limit of indemnity
	Excess
	Renewal date

General													
7.	<p>Do you have any sub-agents or Appointed Representatives? If "Yes", please provide details below.</p> <p>Note that we will not accept any business from sub-agents, sub-brokers or Authorised Representatives unless agreed by us in writing.</p> <p>Are you a member of a Network? If "Yes", please provide details below.</p>												
	<p>Please provide below details of the classes of business you wish to place through Morton Michel Ltd and an estimate of the annual premium.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Class of business</th> <th style="text-align: left;">Estimated annual premium</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td>£</td> </tr> <tr> <td>2.</td> <td>£</td> </tr> <tr> <td>3.</td> <td>£</td> </tr> <tr> <td>4.</td> <td>£</td> </tr> <tr> <td>5.</td> <td>£</td> </tr> </tbody> </table>	Class of business	Estimated annual premium	1.	£	2.	£	3.	£	4.	£	5.	£
	Class of business	Estimated annual premium											
1.	£												
2.	£												
3.	£												
4.	£												
5.	£												

Declaration		
8.	Have you or any principal, partner or director:	
	Been convicted of a criminal offence other than a minor motoring offence or is the subject of any current criminal or civil proceedings?	
	Been found liable for negligence, fraud, wrongful trading / malpractice?	
	Been disqualified under company law?	
	Owned or managed a company which has entered into liquidation, administration or any other form or arrangements with its creditors other than in respect of solvent amalgamation?	
	Owned or managed a company involved in criminal or civil proceedings?	
	Had any licence or authorisation to conduct business refused, suspended, withdrawn or not renewed or are you aware of any circumstances which may result in your licence or authorisation being refused, suspended, withdrawn or not renewed?	
	Been censured, fined, disciplined, suspended, expelled or refused membership by any industry regulatory body?	
	Had any agency with an insurer refused or cancelled other than due to a lack of support?	
	If "Yes" to any of the above, please provide details below.	
	Do you have in place policies for anti-bribery and corruption and comply with all relevant Money Laundering and Financial Sanctions Regulations	
	If "no", please provide details below.	
I/We hereby declare and affirm that I/We are duly authorised to submit this application and make this declaration on behalf of the Company shown above.		
I/We apply for agency facilities with Morton Michel Ltd and declare the above particulars are to the best of my/our knowledge and belief true and will I/We notify Morton Michel Ltd of any subsequent material changes to the above particulars.		

Name	
Signature	
Position	
Date	

Privacy Notice

This Privacy Notice provides details of the personal data we collect, what we do with it, how you might access it and who it might be shared with.

Our Contact Information and Data Protection Officer

Morton Michel Limited is a subsidiary of PIB Group Limited.

Our Data Protection Officer can be contacted directly here:

Data Protection Officer
PIB Group Limited, 1 Minster Court, Mincing Lane, London, EC3R 7AA
dpo@pib-insurance.com
0330 058 9700

What we do with your personal data

We process your personal data only for the purpose for which it is collected. If you use our services or request information, we collect your personal data for use by PIB Group Limited and subsidiary companies. We use this personal data for the provision of information and services or the performance of the contract.

We may use your personal data for other similar purposes, including marketing and communications, but that will only occur if we have your consent or where, as a current or previous user of our services, we rely on a legitimate interest justification for doing so. You have a right at any time to stop us from contacting you for marketing purposes. Please contact us to do so - see above.

The way insurance works means that, if you have a contractual or service relationship with us, your information may be shared with, and used by, a number of third parties in the insurance or risk sector; for example, insurers, agents or brokers, reinsurers, loss adjusters, sub-contractors, specific service providers, claim management companies, credit reference agencies, regulators, law enforcement agencies, fraud and crime prevention and detection agencies and compulsory insurance databases. We will only disclose your personal information in connection with the contract or service that we provide and to the extent required or permitted by law.

More detailed information on how the Insurance market works and transfers data, is available from the London Insurance Market Core Uses Information Notice available [here](#).

What personal data do we collect?

The personal data we collect depends on whether you just visit our website or use our services. If you visit our website, you do not need to provide us with any personal data. However, your browser transmits some data automatically, such as the date and time of your visit, your browser type, your operating system, the last web page you visited and your IP address. Our Cookie policy is [here](#).

If you use our services, personal data is required to fulfil the requirements of a contractual or service relationship, which may exist between you and our organisation. In addition, special categories of personal data such as data about your health and criminal convictions may be collected and processed on a consent or public interest basis if this is necessary for insurance purposes.

If you provide us with personal data about other people, for example; family members you wish to add to a policy or contract, we expect you to ensure that they know you are doing so and they are content with their information being provided to us.

As a minimum if you use a simple contact form on our website, you will be providing us with your name, address, telephone number and email address.

We may record or monitor calls for training purposes, to improve the quality of our service and to prevent and detect fraud. We may also use CCTV recording equipment in and around our premises.

How do we look after personal data?

We only collect personal data that is required for the purposes of providing our insurance and risk service, as described above. We restrict, secure and control all of the data we hold, against unauthorised access, damage, loss or destruction; whether physical or electronic. We retain personal data only for as long as is necessary to perform the functions above and to respond to your requests, or longer if required by law, or if we need to retain the data to perform a contract. If we retain your personal data for historical or statistical purposes we will ensure that the personal data cannot be used for any other purpose. Whilst in our possession, together with your assistance, we try to maintain the accuracy of your personal data.

How can you access your personal data?

You have the right to request access to any of your personal data we may hold. If any of that information is incorrect, you can request that we change it. If we are not using your information correctly, you can request that we stop using it or that we delete it completely.

If you would like to make a request to see what personal data of yours we hold, you may make a request to our Data Protection Officer using the details above.

Where we have asked for your consent to use your personal data, you have the right to withdraw that consent at any time. If you withdraw your consent, we will stop using your personal data where legally possible. Any processing undertaken before your withdrawal remains valid and lawful.

Changes to our Privacy Notice

We keep our privacy notice under regular review and we'll place any updates on this web page. This privacy notice is version 1.57.

Our Supervisory Authority

You have the right to lodge a complaint with any Supervisory Authority. See our Supervisory Authority contact details below:

Information Commissioner's Office
Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF
0303 123 1113
<https://ico.org.uk/>

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