

# Registering an Adviser

## Equity Release and Mortgage products

This registration form should be completed by firms who are already registered with Canada Life Home Finance and wish to register an additional adviser.

It is for advisers who wish to recommend our mortgage products, including Lifetime Mortgages. There is a separate registration form for our annuity and drawdown products.

**All sections of this form are mandatory.** Our Terms of Business can be found at [www.canadalife.co.uk](http://www.canadalife.co.uk)

### 1 Name of business

Name of Firm (FCA authorised name)	
FCA firm reference number (as it appears on the FCA register)	

### 2 Advisers

Please supply the details of the qualified adviser(s) you wish to register at this time. Please duplicate this Adviser page as many times as required.

Please note that any change to the answers given to the yes/no questions below must be notified to us within 5 working days.

#### Adviser

Name	
Telephone number	
Correspondence address (if different to registered address)	
Unique email address	
Administrator email address	

Please tick this box to confirm this adviser is qualified to advise on equity release

Please tick this box to confirm that this adviser has reviewed our products and their features on our website

## 2 Advisers (continued)

Has the adviser named above at any time:	
a.	Been declared bankrupt? <input type="checkbox"/> Yes <input type="checkbox"/> No
b.	Been the subject of a receiving order? <input type="checkbox"/> Yes <input type="checkbox"/> No
c.	Been the subject of a court judgement for any outstanding debts? <input type="checkbox"/> Yes <input type="checkbox"/> No
d.	Been the subject of an investigation from a regulatory body? <input type="checkbox"/> Yes <input type="checkbox"/> No
e.	Been the subject of a complaint in the last 36 months? <input type="checkbox"/> Yes <input type="checkbox"/> No
f.	Entered into an arrangement with creditors? <input type="checkbox"/> Yes <input type="checkbox"/> No
g.	Been the director of a company which has been wound up other than for purposes of amalgamation or reconstruction? <input type="checkbox"/> Yes <input type="checkbox"/> No
h.	Been disqualified or prohibited from being a company director? <input type="checkbox"/> Yes <input type="checkbox"/> No
i.	Been subject of, or convicted of, any criminal offence? <input type="checkbox"/> Yes <input type="checkbox"/> No
If you have ticked "Yes" to any of these, please give details	
Has the adviser ever had any complaints or been subject to litigation relating to the sale of Equity Release products? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If "Yes" please give details	

## 3 Evidence of Equity Release qualification(s)

Please provide evidence of the qualification(s) held by the adviser named above. We will accept one of the following:

- A copy of the exam certificate or exam statement from the IFS or CII.
- A copy or screen print of a learning statement from the IFS or CII.
- Letter or email from Compliance, HR, or a Director of the firm, confirming they have satisfied themselves that the adviser holds the equity release qualification. This should be provided on letterheaded paper or from a company email address, and include the signatory's job title.

**Please note, we will be unable to provide access to the KFI Generator if we do not receive the evidence of qualification.**

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Declaration

Signed by

--

<b>Print name</b>	
<b>Date</b>	

In the presence of

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<b>Print name</b>	
<b>Date</b>	

## Contact us

Please send your completed form and the evidence of adviser(s) qualification(s) to Canada Life Adviser Support via:

**By post**

Canada Life Home Finance,  
110 Cannon Street, London, EC4N 6EU



**By email**

[hf-applications@canadalife.co.uk](mailto:hf-applications@canadalife.co.uk)



**Call us - Support team**

0800 068 0212



**Online**

[www.canadalife.co.uk](http://www.canadalife.co.uk)

