



TOP TIPS

from Business Processing

When you send us an Income Assured Plus application it first goes to our Business Processing Department whose job it is to get the application from receipt to inception with the minimum of delay and disruption to you. To help us do that please follow these simple tips.

Submitting an Application form

- You **must** be a CF30 adviser to advise on and sell Income Assured Plus because it has an option to include an investment element even though this can be de-selected and the contract taken out on a 'pure' protection basis. If you are not CF30 it will be necessary for you to refer the case to a colleague who is CF30 to advise on and sell the business and to submit the application to us.
- Ensure that your adviser details are on the front of the application form, including your contact details.
- Ensure that you have completed all the tick-boxes because omitted or incomplete information will delay the application.
- Ensure that for **all applications** the Identity Verification has been completed.
- Ensure that the Direct Debit Mandate has been signed and dated.
- Ensure that the application form has been signed and dated by the applicant.

What next?

- A prompt response to our email queries, information requests and sending information on to your clients will speed up the whole process.
- When clients complete any forms, whether it be questionnaires, additional information statements or acceptance forms, please make sure that the client signs and dates each one taking care to read all the information carefully.
- If other than standard (special) terms are issued, please ensure acceptance forms are signed and dated by your client and that the signature matches that provided on the application form.

If you wish to discuss a case with us or to find out how your client's application is progressing, please call our Customer Services Department on 0845 603 8085.

As the contract contains an investment option, business will only be accepted from intermediaries regulated for investment business.

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Authorised and regulated by the Financial Services Authority.