Agency application

Peach Pi is a niche commercial insurer. It offers fresh and agile commercial insurance through a hand-picked community of broker partners.

Thank you for expressing an interest in trading with Peach Pi. This application must be completed by a Director, Partner or Principal acting on behalf of the Applicant.

Your details

Yes No

Are you authorised to trade in general insurance in the UK?

What is your FCA authorisation number?

What is your ICO registration number?

Number of years trading?

Please note: Peach Pi products are currently available to E-Trade via the Acturis trading platform only.

Checklist

The following information is required in order to us to consider your application.

Evidence of your professional indemnity insurance cover. If fidelity cover is not included please provide evidence of separate cover.

Copy of your financial statements

Copy of your business plan and/or financial projections

Details of your client money arrangements

List of sub-agents if applicable

Legal status

What is the legal status of the Applicant?	Limited	PLC	Sole Trader	Partnership
Your registered name			Registered number	
Number of offices		Number of employ	ees	
Any trading names and trading addresses				
Primary contact name		Job title		
Telephone	En	nail		



Please tick if attached

Accounting

Name and contact details for finance (if different from above).

Accountant name

Accountant address

Auditor name

Auditor address

People

Please provide the following information in relation to all Directors, Partners or Principal and all FCA approved persons.

Title	First name		Surname
Home address			
Telephone		Email	
FCA approved num	per		Years active in the insurance industry
Title	First name		Surname
Home address			
Telephone		Email	
FCA approved num	ber		Years active in the insurance industry
Title	First name		Surname
Home address			
Telephone		Email	
FCA approved number			Years active in the insurance industry

People (continued)

Please provide the following information in relation to all Directors, Partners or Principal and all FCA approved persons.

Title	First name		Surname		
Home address					
Telephone		Email			
FCA approved numl	ber		Years active in the insurance industry		
Title	First name		Surname		
Home address					
Telephone		Email			
FCA approved numl	ber		Years active in the insurance industry		
				Yes	No
Do any of the directors hold directorships in organisations other than the applicant's?					
If yes please provide	e details.				

Fit and proper status

Please answer yes or no.	Yes	No
Has a petition for bankruptcy or compulsory winding up of the firm ever been presented?		
Has the firm had a receiver or administrator appointed, failed to satisfy a debt adjudged due, or come to a compromise or similar arrangement with any of its creditors?		
Has the firm been the subject of a reconstruction, whether as a result of any form of insolvency or otherwise?		
Has the firm been a defendant in any criminal or civil proceedings or arbitration within the last 5 years or is any unsatisfied judgement debt or award outstanding against it?		
Line any action and have a started into in the last Course whether an exist on an avertic basis		

Have any settlements been entered into in the last 5 years, whether or not on an ex-gratia basis, to avoid legal action being brought against the firm or to avoid publicity?

Fit and proper status

Please answer yes or no.

Has any director, partner, principle or approved person been convicted of fraud or other dishonesty or an offence under legislation (whether or not in the UK) relating to companies, building societies, industrial and provident societies, credit unions, friendly societies, insurance, banking or other financial services, insolvency, customer credit or consumer protection?

Is the firm involved as a defendant in any proceedings, investigations or other events referred to in any of the above questions which are not yet determined? Or are any such proceedings, investigations or other such events pending?

Has the firm ever been refused, or had revoked, any licence, membership, authorisation, registration or any other permission granted by a financial services regulator in the UK or overseas?

If you have answered yes to any of the above questions please provide further information including the date(s) the event(s), the amount(s) involved, the outcome and any relevant or explanatory circumstances.

Trading

Please provide a brief summary of the business in terms of target markets, distribution and development.

Yes No

Trading

Confirmation of all other markets where you hold agency facilities.

AIG	Beazley	Ecclesiastical	Lloyd's	QBE
Allianz	Brit	Equity	LV	RSA
Ansvar	Chubb	Red Star	Markerstudy	Travelers
Aviva	Co-operative	Hiscox	NFU	Zenith
АХА	Covea	Legal & General	NIG	Zurich

Other

Your approximate annual gross written premium by business line.

Financial Lines PI, Med Mal	£	Property	£
Liability	£	Package/Combined	£

Details of any delegated authority arrangements (if applicable).

Details of any network, software house or marketing group membership.

Trading

Please note: Peach Pi products are currently available to E-Trade via the Acturis trading platform only.

Please tick which software house platforms you use.

Acturis	Applied Systems	CDL	Open Gl		
SSP	TGSL	Other			
		Yes	No		
Do you trade diree	ctly with customers via your own v	vebsite?			
Quote & Buy?					
Web address:	www.				
		Yes	No		
Do you trade via comparison websites?					
If yes please provi	de details.				



Declaration

Yes No

Please confirm that the checklist is complete to accompany this application

The Applicant wishes to be appointed as an agent of Peach Pi.

The completion and submission of this application is not binding upon either party and no relationship, whether of agency or otherwise, shall arise or be construed between the Applicant and Peach Pi by virtue of completion of this application or its consideration by Peach Pi.

The Applicant understands and agreed that its appointment as an agent of Peach Pi is conditional upon and subject to:

- a) Peach Pi's confirmation that the Applicant is approved to represent Peach Pi's interests; and
- b) The Applicant having read, signed and returned to Peach Pi the Terms of Business Agreement together with any other documentation required by Peach Pi.

All information supplied will be used by Peach Pi to assess the application, maintain records and (if successful) administer the Applicant's agency.

Peach Pi reserves the right to make enquiries in respect of the credit status of the Applicant, it's Directors, Partners or Principal, including making credit checks.

Peach Pi may share information with other insurers as set out in the Terms of Business Agreement. Further details of how such information may be used can be obtained from Peach Pi.

The Applicant undertakes to inform Peach Pi immediately if any of its Directors, Partners or Principal are party to any circumstance which changes any answers given in the fit and proper declaration.

Please tick the box to confirm that you understand the terms of this application and warrant that you have the authority to apply on behalf of the firm and that all information contained in it is accurate.

Title

Name

Date

Please email this form and the accompanying information to <u>enquiries@peachpi.co.uk</u> Any enquiries regarding the completion of this form can also be emailed to this address.