

Commission Account Administration Form (CAAF)

Please complete this form if You are a UK-based business or organisation and are permitted to carry out insurance business as an intermediary directly authorised by the Financial Conduct Authority (FCA) or Prudential Regulation Authority (PRA) or as a professional firm regulated by a Designated Professional Body and either:

- **You wish to enter into an agreement with us in order to sell our products yourself, or**
- **You wish to enter into an agreement with us in order to sell our products via your appointed representative.**

If none of the above apply to You, please contact us, UNUM Limited, on 01306 644787 to find out if You are entitled to complete this form. If You are an appointed representative of an authorised firm (Principal), please check if your Principal has already accepted our Terms of Business. If not, you should pass this form to them to complete themselves.

Please complete the form using BLOCK CAPITALS, ticking boxes as appropriate, and return it to:

Agency Department
Unum Limited
Milton Court
Dorking
Surrey
RH4 3LZ

or by email to agency.desk@unum.co.uk.

If you have any questions about your application, please contact the Agency Department on **01306 644787**.

Defined terms used in this form shall have the meaning given to them in the Terms of Business, which can be viewed [here](#).

You must read the Terms of Business and the Quote before completing this form (the CAAF) as, once we confirm to You in writing (which includes, without limitation, confirmation by email) that we accept the completed CAAF, an agreement between You and us is formed.

1. Regulatory details

Your Legal name

Trading name (if different)

Status

Ltd / PLC LLP

Partnership

Sole trader

Other (please specify)

Company Registered Number (if limited company or limited liability partnership)

Your FCA Firm reference number

2. Contact details

Main business contact name

Contact name for accounting / commission enquiries

Address for correspondence

Telephone

Fax

Email

This address is:

Company head office

Main trading location

Branch office

Home address

3. Address for commission statements (if different from correspondence address)

Address for commission

Telephone

Fax

Email

This address is:

Company head office

Main trading location

Branch office

Home address

If you are directly authorised but affiliated to a support services provider

Name of provider of support services

4. Bank details for commission payments

For payment by BACS, please provide your bank account details.

Bank

Bank account number

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Sort code

Account name

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Preferred frequency of commission payments

Monthly

Fortnightly

Weekly

unum.co.uk

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