



Beneficial Trust
& Will Company
Est 1999

Associate Registration Form (Professional Indemnity)

Agreement Summary

1. I hereby apply to be registered with the Beneficial Trust & Will Co Ltd scheme
2. I understand that all wills produced are fully covered by the Beneficial Trust & Will Company Professional Indemnity Policy on the condition that I comply precisely with operating procedures and instructions provided by Beneficial Trust & Will Co Ltd whether written or oral and use any forms and documentation provided by Beneficial Trust & Will Co Ltd.
3. I agree to act in a professional and ethical manner when taking clients instructions in relation to Beneficial Trust & Will Co Ltd's products and services.
4. I accept that my registration may be immediately terminated by Beneficial Trust & Will Co Ltd should I fail to advise clients adequately, fail to forward instructions or information to Beneficial Trust & Will Co Ltd promptly, act in an unprofessional manner or fail to treat as confidential any information shared by the client or Beneficial Trust & Will Co Ltd.
5. I agree to treat as confidential and not any time for any reason or permit to be disclosed to any person or otherwise make use of information relating to the procedures, documentation or working practices of Beneficial Trust & Will Co Ltd
6. I agree to pay Beneficial Trust & Will Co Ltd registration fee of (£199.00+VAT) for my Estate Planning Business pack & PI cover up to £2m provided by AIG Europe up to £2m
7. I would like to attend the next BTWC Training Course Yes: No:

Associate Details

Associate Name: _____ Telephone: _____
Trading Name: _____ Mobile: _____
Address: _____ Email: _____
_____ IFA (FCA Reg) Yes/No
_____ Tied (FCA Reg) Yes/No
Post Code: _____ Other(Please State)

Signed: _____ Date: _____

Please Provide a brief professional history of your experience and return with this form

For Office Use Only

Date Received: _____ Reg Confirmed: Yes/No _____