

Protection Fact Find

Client Information

Applicant (1) _____

D.O.B _____

Occupation -----

Smoker _____

Income _____

Applicant (2) _____

D.O.B _____

Occupation -----

Smoker _____

Income _____

Mobile _____

Email _____

Home _____

Cover Information

Cover Type Life Critical Illness Level Decreasing Increasing

Amount of Cover _____

Term _____

Any Additional Benefits (wavier of premium, income protection, family income benefit)

Premium Type Guaranteed Reviewable

Budget _____

Reason for cover (protect mortgage, family protection, if it is to protect mortgage is mortgage on repayment or interest only, amount of outstanding mortgage and term)

Existing Cover Details (if applicable)

Additional Notes

Explicit Consent Form

Sensitive Personal Data

I give explicit consent for you [Making Mortgagees Simple Limited] and [The On-Line Partnership Limited and by On-Line Partnership Group Limited] to process any sensitive* personal data relating to me to:

- Enable the provision of professional opinions and high quality recommendations;
- Make application(s) for a specified product or products;
- Ensure advice is suitable and meets compliance standards set by the FCA.

The type of information covered by this consent includes:

- Personal data concerning my health, sex life or sexual orientation;
- Personal data relating to criminal convictions and offences;
- Personal data revealing racial or ethnic origin.

I understand that you may pass this information on to a named product provider during the product application process. My sensitive personal data will be handled only by staff necessarily involved in these processes and at all times my sensitive personal data will be kept secure and confidential. Once my data has been passed to a named product provider they will provide me with a privacy notice in respect of the processing they will carry out as a data controller in their own right. My data will be retained in line with the FCA's record keeping requirements.

I understand that my consent may be withdrawn at any time as outlined in the privacy notice.

1 st Client Name	
Signature	
2 nd Client Name	
Signature	
Date	

**sensitive personal data refers to:*

- *Personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs or trade union membership;*
- *Processing of genetic data, biometric data for the purpose of uniquely identifying a living individual;*
- *Personal data concerning health, sex life or sexual orientation;*
- *Personal data relating to criminal convictions and offences.*