

Sales Force Application

(CONFIDENTIAL)

**PLEASE COMPLETE IN BLACK INK
AND IN YOUR OWN HANDWRITING.**

Information supplied in this application will be subject to verification and supplementary enquiries, including credit checks. If it is established that relevant items have been omitted, either intentionally or through lack of care, or that information is inaccurate or misleading, then the application may be rejected.

An individual may not assume that because information is in the public domain or has previously been disclosed to a regulatory body it is known. In all circumstances, the information submitted must be full, frank and unambiguous.

PERSONAL DETAILS

Surname Forename(s)

Maiden Name(s) (if applicable)

Previous Name(s) Date(s) Name(s) Changed / /

Mr Mrs Miss Ms

Marital Status National Insurance No.

Number of Children under 18

Present Address (including postcode)

Home Telephone No. How long have you lived there? Yrs

Mobile Telephone No. E Mail

Is your home: Owned by you? Rented by you? Other? – please specify:

Birthplace Nationality

Do you have a current driving licence? Yes No

Indicate any current Endorsements

Are you legally eligible for employment in the UK? Yes No

What is your current employment status? Employed Self Employed Unemployed
(If unemployed, you will be required to complete a supplementary form at interview.)

Notice period required Partners Occupation

May we contact you at work? Yes No Work Telephone No.

Do you have any holidays booked at the moment? If so please give details

Have you previously worked for, or applied to, Key Retirement Solutions. If so, please give details including dates

EDUCATION

| Names and addresses of secondary schools/ colleges/universities attended. | From: / / To: / / | Examinations passed/Qualifications gained. (Please indicate subjects and grades.) | | | | | | | | | | | | | | | |
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Please give details of any professional training and qualifications, with dates attained.

You will be required to produce professional training certificates.

EMPLOYMENT HISTORY

Begin with your present position and go back 10 years. Please use the continuation sheet (on the last page) if necessary.
I Authorise you to contact all my PREVIOUS employers for a reference prior to offer:

PRESENT EMPLOYER

| | | | | |
|----------------------|----------------------|------------------------|--|------------------------|
| Name | <input type="text"/> | Position held | <input type="text"/> | |
| Address | <input type="text"/> | Responsibility | <input type="text"/> | |
| <input type="text"/> | | Reason for leaving | <input type="text"/> | |
| <input type="text"/> | | <input type="text"/> | | |
| <input type="text"/> | | <input type="text"/> | | |
| Telephone | <input type="text"/> | From | <input type="text"/> / <input type="text"/> / <input type="text"/> | |
| Nature of Business | <input type="text"/> | | | |
| Contact Name | <input type="text"/> | | | |
| Annual Income | Start | £ <input type="text"/> | Finish | £ <input type="text"/> |

PREVIOUS EMPLOYER

| | | | | |
|----------------------|----------------------|------------------------|--|------------------------|
| Name | <input type="text"/> | Position held | <input type="text"/> | |
| Address | <input type="text"/> | Responsibility | <input type="text"/> | |
| <input type="text"/> | | Reason for leaving | <input type="text"/> | |
| <input type="text"/> | | <input type="text"/> | | |
| <input type="text"/> | | <input type="text"/> | | |
| Telephone | <input type="text"/> | From | <input type="text"/> / <input type="text"/> / <input type="text"/> | |
| Nature of Business | <input type="text"/> | | | |
| Contact Name | <input type="text"/> | | | |
| Annual Income | Start | £ <input type="text"/> | Finish | £ <input type="text"/> |

PREVIOUS EMPLOYER

| | | | | |
|----------------------|----------------------|------------------------|--|------------------------|
| Name | <input type="text"/> | Position held | <input type="text"/> | |
| Address | <input type="text"/> | Responsibility | <input type="text"/> | |
| <input type="text"/> | | Reason for leaving | <input type="text"/> | |
| <input type="text"/> | | <input type="text"/> | | |
| <input type="text"/> | | <input type="text"/> | | |
| Telephone | <input type="text"/> | From | <input type="text"/> / <input type="text"/> / <input type="text"/> | |
| Nature of Business | <input type="text"/> | | | |
| Contact Name | <input type="text"/> | | | |
| Annual Income | Start | £ <input type="text"/> | Finish | £ <input type="text"/> |

SELF-EMPLOYED

If your career history includes any period(s) of Self-Employment, please give full details for reference purposes. (Use supplementary sheet if necessary.)

| | | |
|-----------------|--|---|
| Company Name | <input type="text"/> | |
| Occupation | <input type="text"/> | |
| From | <input type="text"/> / <input type="text"/> / <input type="text"/> | To <input type="text"/> / <input type="text"/> / <input type="text"/> |
| Accountant | <input type="text"/> | |
| Name | <input type="text"/> | |
| Address | <input type="text"/> | |
| | <input type="text"/> | |
| Telephone | <input type="text"/> | |
| Solicitor | <input type="text"/> | |
| Name | <input type="text"/> | |
| Address | <input type="text"/> | |
| | <input type="text"/> | |
| Telephone | <input type="text"/> | |
| Trade Reference | <input type="text"/> | |
| Name | <input type="text"/> | |
| Address | <input type="text"/> | |
| | <input type="text"/> | |
| Telephone | <input type="text"/> | |

WE WILL REQUIRE YOU TO PROVIDE PERSONAL REFERENCES FROM PROFESSIONAL PERSONS KNOWN TO YOU.

UNEMPLOYED

Please list dates and circumstances of unemployment (Use supplementary sheet if necessary.)

| | | | |
|--------------|--|----|--|
| From | <input type="text"/> / <input type="text"/> / <input type="text"/> | To | <input type="text"/> / <input type="text"/> / <input type="text"/> |
| Circumstance | <input type="text"/> | | |
| | <input type="text"/> | | |
| From | <input type="text"/> / <input type="text"/> / <input type="text"/> | To | <input type="text"/> / <input type="text"/> / <input type="text"/> |
| Circumstance | <input type="text"/> | | |
| | <input type="text"/> | | |
| From | <input type="text"/> / <input type="text"/> / <input type="text"/> | To | <input type="text"/> / <input type="text"/> / <input type="text"/> |
| Circumstance | <input type="text"/> | | |
| | <input type="text"/> | | |

BANK AND FINANCIAL STATUS

(Please use a supplementary sheet if you hold more than one bank/building society account.)

Bank/Building Society Name

Address

Account Name

Account Number

Sort Code

 -

How long have you banked there?

 yrs

If less than 12 months, please give details below:

Have you ever been, or likely to be declared bankrupt?

Yes

No

Have you any unauthorised debts?

Yes

No

Have you any financing debts (excluding authorised bank loans/mortgages)?

Yes

No

Have you made any arrangements or composition with your creditors?

Yes

No

Have you any county or high court judgments against you?

Yes

No

If you answered 'yes' to any of the questions above you will be required to complete a supplementary form at interview.

Have you ever been convicted of a criminal offence or are there any proceedings pending?

Yes

No

Have you ever been dismissed from employment?

Yes

No

Have you ever been subject to disciplinary proceedings?

Yes

No

Have you ever been refused a Fidelity bond?

Yes

No

Have you a current debt with your existing or previous employer?

Yes

No

If you answered 'yes' to any of the questions above, please give details below.

We will obtain a credit reference.

MEDICAL

Please advise number of sickness absence days taken during previous 12 months and reason for the absence.

We welcome applications from suitable individuals regardless of any disabilities. Please advise if you have any special requirements in relation to the interview or selection process.

If required, are you prepared to undergo a medical examination and/or
Complete a detailed health questionnaire? Yes No

As the company operates a no smoking policy, please indicate if you smoke. Yes No

AMBITIONS AND SKILLS

Please indicate why you are interested in joining Key Retirement Solutions and why you will be successful in this role. (Please use a continuation sheet if necessary.)

HOBBIES AND INTERESTS

Please indicate any hobbies or interests you have.

ADDITIONAL BUSINESS INTEREST

Do you have any business interest additional to your full time employment?

Yes No

If yes, please give details.

Business Connection

Are you in partnership, or do you have a business relationship, with any person who is:

TICK

an independent intermediary?

a partner in another partnership, one of the partners in which is an independent intermediary?

a director of a company which is an independent intermediary?

an Appointed Representative or Company Representative of another company which is regulated by the Financial Services Authority for Life Assurance, Pension and Permanent Health Insurance business?

If you have ticked any of the above, please give details on an attached sheet

DECLARATION AND UNDERTAKING

- I apply for employment with Key Retirement Solutions as an authorised representative of Key Retirement Solutions and declare that:
 - a) the information I have supplied is complete and correct, and
 - b) I undertake to notify KRS immediately of any changes occurring in my circumstances, qualifications and/or to the information provided here should this occur either prior or subsequent to my appointment.
- I authorise KRS to make such enquiries and seek further information as required to support my application.
- I understand that the information I have given will be used to determine my suitability to be offered employment and that any such offer is subject to receipt of satisfactory references.
- I understand that should any information given here be found to be incorrect or if important information is withheld, any offer will be withdrawn and any employment may be terminated by KRS.

Name (block capitals)

Signed

Date / /

FOR OFFICE USE ONLY

Telephone calls may be monitored or recorded to enable us to improve our service.

Key Retirement Solutions Limited. Registered in England No. 2457440. Registered Office: Harbour House, Portway, Preston, Lancs. PR2 2PR
Telephone: 01772 840298 Facsimile: 01772 840280

Key Retirement Solutions is authorised and regulated by the Financial Services Authority

EMPLOYMENT HISTORY (Continuation Sheet)

Surname Forename(s)

PREVIOUS EMPLOYER

Name Position held
Address Responsibility
 Reason for leaving

Telephone From / / To / /
Nature of Business
Contact Name
Annual Income Start £ Finish £

PREVIOUS EMPLOYER

Name Position held
Address Responsibility
 Reason for leaving

Telephone From / / To / /
Nature of Business
Contact Name
Annual Income Start £ Finish £

PREVIOUS EMPLOYER

Name Position held
Address Responsibility
 Reason for leaving

Telephone From / / To / /
Nature of Business
Contact Name
Annual Income Start £ Finish £