



# Personal Touch Financial Services

## Common Errors & Omissions - Application Forms

To assist us in processing your application as quickly as possible, please see below a list of common errors and omissions which can cause a delay in the application process if not provided. Please take time to ensure you have included all of the requested information.

## Branch Application

- ✓ **Page 2 - Section 1**  
Please ensure any trading styles are fully detailed as this information is needed for agreements, consumer credit licence registration, data protection registration, financial promotions material and FSA registration.
- ✓ **Page 4 - Section 4**  
Please fully complete section 4 '**Branch Financial Details**' in order for the correct commission level to be applied to your account.
- ✓ **Page 5 - Section 6**  
Please ensure that at least one branch principal is suitably industry qualified and experienced (i.e. competent adviser status within the last two years).
- ✓ **Page 6 - Section 7**  
'**Branch Credit Details**' - Please take care not to omit any relevant information as failure to disclose can result in rejection of an application.

## Registered Individual Application

- ✓ **Page 2 - Section 1**  
Please ensure that three years full address history is provided.
- ✓ **Page 3 - Section 1**  
Please take care when specifying the product areas you are applying for. Please only tick those products you require to be authorised in.
- ✓ **Page 3 - Section 3**  
Please note that the '**Employed/Self Employed**' section relates to how you will be working through Personal Touch, not your current employment status.
- ✓ **Pages 4 - Section 4**  
'**Fitness and Propriety**' - Please take care not to omit any relevant information as failure to disclose can result in rejection of an application
- ✓ **Page 6 - Section 5**  
'**Employment/Education History**' – Please ensure that five full years employment history is completed including full address and contact details. This is required for all individuals regardless of industry or non industry related experience. Should you not want Personal Touch to apply for a specific reference at the point of application, please clearly identify this under '**Permission to Reference Employer/Network**'.
- ✓ **Page 8 - Section 7**  
'**Assets and Liabilities**' - Please complete all sections including investment property details.

Personal Touch Financial Services Ltd is authorised and regulated by the Financial Services Authority. Registered in England & Wales No.3406454.

## Contact us

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