

# FirstLIFE

Online Intermediated Solutions

## 2017 FirstLIFE Membership Application

Our vision is to re-intermediate the Intermediary and offer individuals and organisations access to unique marketing in the Financial Services Sector with minimal cost to entry. FirstLIFE aims to promote individuals as well as the Intermediary body as a whole.

With this in mind we ensure that everyone who joins meets the standard, to ensure we have confidence that the South African Consumer will be well looked after.

It's time we take back our image and tackle the onslaught of negative marketing by certain Direct Companies to ensure we build credibility back into the words "Intermediary, Advisor, Financial Planner, Broker and Agent".

## Documents required with this Application

- A clearly completed membership application form
- A clearly completed lead profiling purchase order
- A clear copy of an identification document (ID, Drivers License)
- For bank account debit orders, proof of bank account is required (cancelled cheque and/or account confirmation from the bank on a bank letter head)
- Proof of your highest qualification
- A copy of your letter of authority or disclosure letter from the FSP for which you act as an intermediary.
- Proof of completion of RE examinations

## Important Note

FirstLIFE is a membership. We reserve the right to accept or decline a new member's application as per our full terms and conditions. We bill leads in arrears via debit order only.

However we reserve the right to request an upfront payment when we feel necessary. Any advisor who has been less than two years in the industry and / or has a negative credit history may be requested to make a upfront payment, or a security deposit before that member is taken on.

Please read the terms and conditions carefully, and if you have any questions feel free to ask.

**We look forward to receiving your application and having you on board!**