

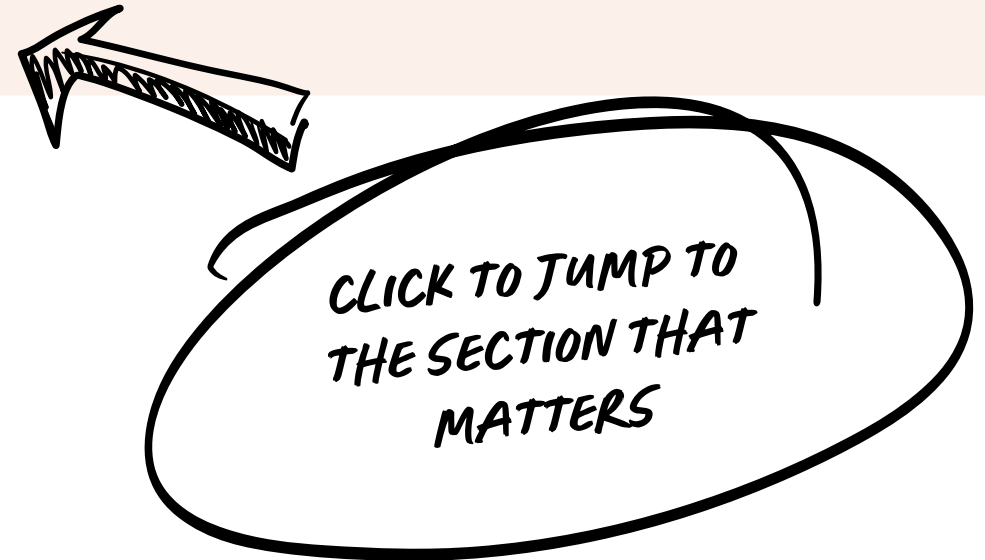
Intermediaries and investment professionals only: not for public distribution

How to register as a Santander broker



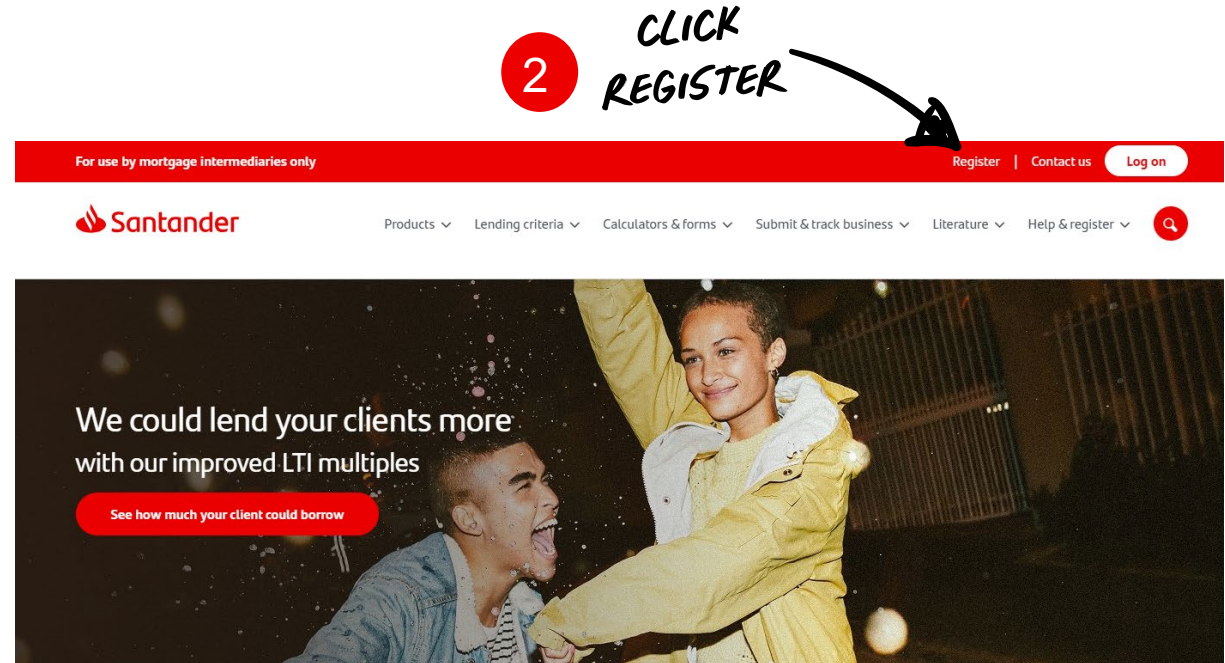
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Register – steps you need to follow

1. Go to our [website](#)
2. Click 'Register'.
3. Choose your registration option:
 - Appointed representative.
 - Register as a directly authorised individual.
 - Register as a directly authorised firm.



3 CHOOSE YOUR OPTION

 Appointed representative Register a new intermediary (or re-activate an existing introducer code) from an appointed representative company. Register	 Register as a directly authorised individual Requests from an individual intermediary joining a directly authorised firm already trading with Santander. Register	 Register as a directly authorised firm Requests from a directly authorised firm who've never transacted business with Santander under their current FCA number (or are re-activating their introducer code). Register
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Appointed representative

Register a new intermediary (or re-activate an existing introducer code) from an appointed representative company

Our dedicated team will process your registration request. Please allow 7 working days for your registration details to be sent to you.

Step 1

Where a company is an appointed representative (AR) of a principal company or a network and an individual intermediary contacts us to request registration, all we need from you is an email requesting registration.

The new AR company doesn't already have to be registered with us. This is because we'll already have the completed registration form for the principal company or network on file from when it was first registered.

In your request, you must tell us **all** of the following (any missing information may delay your registration):

1. Name
2. AR company name
3. AR company FRN number
4. Contact details, e.g. address, telephone numbers, email address
5. Confirmation of which mortgage club(s) you wish to use (if applicable). Please also include your membership number
6. Principal company or network name. Please also include your membership number.
7. Principal company or network FCA number
8. Reference number for a completed directly authorised firm form (if applicable)
9. Your last 5 years' employment history, including business name, start date and end date.

Please email your requests from a business email address or an email address that can be verified on the FCA website to msa@santander.co.uk. Please include 'AR registration request' in the email subject line.

Step 2

We'll send the request to the principal company/network to check it's a valid registration request if needed.

Step 3

We'll contact you with your new registration details. If we need your network to validate this before your account is registered, we'll let you know we've requested further information.

If you have any questions, you can email us at msa@santander.co.uk.

EXAMPLE EMAIL

Name: Joe Bloggs

AR company name: Test company

AR company FRN number: 1234567

Contact details, e.g. address, telephone numbers, email address:

1 Test High Street

Test Town

Milton Keynes

MK9 1AN

testcompany@testcompany.co.uk

01642 587 145

Confirmation of which mortgage club(s) you wish to use (if applicable). Please also include your membership number: Test Club, 45678977

Principal company or network name. Please also include your membership number: Principal company or network FCA number: Test Company, Test 456789

Reference number for a completed directly authorised firm form (if applicable): Test 471258

Your last five years' employment history, including business name, start date and end date:
Test company 1 01/01/2020 – 01/07/2025

! You must include **all** information we ask for or your registration could be delayed.

! Once you've sent your email, we'll contact your network principal to confirm your details. This process can take up to 7 days to complete.



Register as a directly authorised individual

1 Personal details > 2 Firm information > 3 Employment details > 4 Financial history > 5 Introducing business > 6 Summary

Registration form

Requests from an individual intermediary joining a directly authorised firm already trading with Santander

Have you received financial crime prevention, fraud, bribery, corruption and anti-money laundering training?

Yes No

Information needed

Please make sure you have all of the information below to hand before you continue. You can't save the form or return to it at a later date.

In your request, you must give us your:

1. Personal details, including your National Insurance number
2. Last 3 years' residential address history
3. Firm details, including FCA number
4. Confirmation of which mortgage club(s) you want to use
5. Last 5 years' employment history, including business name, address, start and end dates and any financial services qualifications
6. Introducing business details, including percentage of business introduced and names and addresses of all introducers.

Declaration

I understand that you'll search credit reference and fraud prevention agencies who'll provide you with publicly held data, including the electoral roll. If I give false or inaccurate information, you may pass details to the credit reference and fraud prevention agencies to help decide my identity and for the prevention and detection of fraud and/or money laundering.

When credit reference agencies receive a search from you, they'll place a search footprint on my credit report. This search won't affect my ability to gain credit.

The information that you give to the credit reference and fraud prevention agencies may be supplied by these agencies to other organisations and used by them to do similar checks, debtor tracing, debt collection and account management.

I understand that before you're able to register me, I must read and accept your [Mortgage Terms of Business](#) and [Data Protection Agreement](#)

I've read and agree to the Mortgage Terms of Business and Data Protection Agreement.

Yes No

**COMPLETE OUR
ONLINE FORM**

CHECK OUT OUR:

- [Data Protection Agreement](#)
- [Mortgage Terms of Business](#)

You'll need this information before you complete the online form:

1 PERSONAL DETAILS

- Personal details, including your National Insurance Number.
- Last 3 years' residential address history.

2 FIRM INFORMATION

- Firm details, including FCA number.
- Your business contact details.
- Confirmation of which mortgage club(s) you want to use and mortgage club number.

3 EMPLOYMENT DETAILS

- Last 5 years' employment history, including business name, address, start and end dates and any financial services qualifications.

4 FINANCIAL HISTORY

- Your professional standing.

5 INTRODUCING BUSINESS

- Introducing business details, including percentage of business introduced and names and addresses of all introducers.

6 SUMMARY

- Check all details you've given us are correct. If you want to make changes, you can go back to any step and make updates.
- Once you're ready to complete the registration, select '**Submit registration**'.



Register as a directly authorised firm

After you select 'Register', you'll need to complete the **mortgage registration form – new firm** in Step 1 below. This is an editable pdf.

Register a directly authorised firm

Requests from a directly authorised firm who've never transacted business with us under their current FCA number (or are re-activating their introducer code).

Our dedicated team will process your registration request. Please allow 7 working days for your registration details to be sent to you.

Step 1

You'll need to complete a [mortgage registration form – new firm](#) which includes reading and agreeing to our [Terms of Business](#) and [Data Protection Agreement](#), and return it to us before we can set you up on our systems.

Please email your request from a business email address or an email address that can be verified on the FCA website to msa@santander.co.uk

Step 2

You'll also need to complete a separate online [Individual registration form](#) for each intermediary that will be part of this firm.

Step 3

We'll contact you with your new registration details or to request further information if we need it.

If you have any questions, you can email us at msa@santander.co.uk

CHECK OUT OUR:

- [Data Protection Agreement](#)
- [Mortgage Terms of Business](#)



INTERMEDIARIES & INVESTMENT PROFESSIONALS ONLY: NOT FOR PUBLIC DISTRIBUTION

Mortgage

Registration form – New Firm/Returning Firm

Please fill in the form using BLOCK CAPITALS and black ink. Tick any boxes which apply.

Santander for Intermediaries

Santander is able to provide literature in alternative formats. The formats available are: large print, Braille and audio CD. If you would like to register to receive correspondence in an alternative format please visit www.santander.co.uk/alternativeformats for more information, ask us in branch or give us a call.

Important information

Our aim is to build a business relationship with you, providing the service you need to make your life as easy as possible. By spending a few minutes completing this form we will be able to set up your company details on our database so we know how and where to contact you with product details and for payment of fees. Thank you for your interest in registering as an Intermediary with us. We look forward to developing a strong business relationship.

1. Firm details

Full legal name of business	Country of operation (if different from country of incorporation)
Business/trading name to be used on documentation (if different from above)	Firm FCA number
Country of incorporation (i.e. in which country was the company established?)	
Companies House number	

2. Firm contact details

Full business address (Registered office)	Telephone number
Postcode	Fax number
Full trading address (address for fee statements (if different from above))	Email address
Postcode	

3. Owners/Partners/Directors/major shareholders (holding shares of 25% or more in the firm, regardless of whether or not they process business)

First owner/partner/director	Alias used, if applicable:
Title	Alias title
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/>
Other <input type="checkbox"/>	Other <input type="checkbox"/>
First name	Alias first name
Middle name(s)	Alias middle name(s)
Surname	Alias surname

! Once you complete the form, you'll need to complete step 2. All individuals need to register as an authorised individual too.

Welcome email and logging on

Once you complete the registration steps, you'll get a welcome email like the one below.

After you get this, you'll need to register your introducer code.

- Go to our [website](#)
- Select '**Log on**'.
- Select '**Registration**' at the top.
- Review the terms of use and declaration and click '**I agree**'.
- Copy and paste your information from your email into the template.
- Set up a password you can remember.
- Click '**Register**'.

After this, you'll need to wait for your passcode which we'll send to you via email within 24 hours. Or you can contact the helpdesk if you haven't got this on **0800 085 1198**.

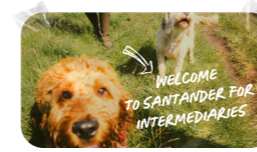
You'll then need to log on as normal.



Congrats! You can now submit business and review your cases with Santander.



Hear about our product launches first on LinkedIn! Why not [follow us](#) now for the latest updates?



Dear Joe Bloggs

Welcome to Santander for Intermediaries. Your account details are shown below. You'll get your individual passcode in the next 24 hours by email.

Getting started

To register your new introducer code, go our [website](#) and follow these simple steps:

- ✓ Click on the [Log on](#) button at the top of the home page.
- ✓ Select **Registration** at the top of the page.
- ✓ Read the terms and conditions and if you accept click **I agree**.
- ✓ Copy and paste the details below into the correct fields.

Company/introducer ID	Test Company, 456789
Initials, surname	J. Bloggs
Email address	Testcompany@testcompany.co.uk
Principal company name	Test Company
Company address	1 Test High Test Test Town Milton Keynes
Company postcode	MK9 1AN

- ✓ Type in a memorable password and then confirm password.
- ✓ Click the 'Register' button.

Here's a copy of our [Data Protection Agreement](#) and [Mortgage Terms of Business](#) if you'd like to read them again.

How to get in touch

For technical support or if you need your passcode urgently, contact our **Introducer Internet help desk on 0800 085 1198**. Available Monday to Friday 9am to 5pm.

How we can help

Visit our website and you'll see Live Chat in the bottom right-hand corner. Your [dedicated contact](#) can also provide help with any queries you may have.

Our [how to use Introducer Internet](#) page will help you with:

- ✓ submitting a mortgage application,
- ✓ submitting a product transfer, and
- ✓ using the Mortgage Application Tracking System.

Follow us

To keep up to date on our latest products and services, follow us on [LinkedIn](#).

Thanks

Registrations Team
Santander for Intermediaries
301 St. Vincent Street, Glasgow, G2 5HN

Important - For security purposes your password and subsequently generated passcode should only be known to yourself. Any suspicion that these secure log on details have been compromised may result in your introducer code being suspended.

WELCOME EMAIL

THANKS

