### **APPENDIX 2**

# Introducer referral sheet



#### For the Introducer to complete

Date (DD	/MN	I/YY)		
	/		/	

Company nar	ne		
BDM name			

Sectio	on 1: Customer details	3				
Title	First name	Surname		Date of bir	th (DD/MM/YY) // [	
Title	First name	Surname		Date of bir	th (DD/MM/YY) // [	
Address						
				Postco	de	
Preferred	telephone number		Best time to call	Afternoon	Evening	

#### Section 2: Customer confirmation on this form

I give consent for the information to be shared with Skipton Building Society so that they can call me on the number provided to discuss their financial advice service.

I have been made aware of the privacy notice on Skipton.co.uk

Signed	Date (DD/MM/YY)
Signed	Date (DD/MM/YY)

#### Section 3: Customer interest

Investment (lump sum)	Investment (regular premium)	Pension	Inheritance tax
Notes			

#### To be emailed to SkiptonDirectSWWMailbox@skipton.co.uk

For SBS Head Office to complete	
Financial Adviser name	RFAT Consultant name
Added to IO	Added to BAR

## Call in<br/>branchTalk to us todayVisit03452667750skipton.co.uk

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