

# Introducer referral sheet



## For the Introducer to complete

Date (DD/MM/YY)

 /  / 

Company name

BDM name

## Section 1: Customer details

Title  First name  Surname  Date of birth (DD/MM/YY)  /  /

Title  First name  Surname  Date of birth (DD/MM/YY)  /  /

Address

  


Postcode

Preferred telephone number

Best time to call

Morning 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](http://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 [SkiptonDirectSWMailbox@skipton.co.uk](mailto:SkiptonDirectSWMailbox@skipton.co.uk)

## For SBS Head Office to complete

Financial Adviser name

RFAT Consultant name

Added to IO

Added to BAR

Call in

branch

Talk to us today

0345 266 7750

Visit

skipton.co.uk