

## Quick Reference Chart

	Appointed Representative	Directly Authorised
<b>Compliance</b>		
Appointed Representative status	✓	
FSA regulatory responsibility with MI as your principal	✓	
Payment of FSA Fees	✓	
PI Insurance	✓	
Comprehensive procedures & documentation to meet FSA requirements	✓	£
Fully compliant point of sale system	✓	£
Compliance support & guidance	✓	£
Compliance audits	✓	£

<b>Training</b>		
Comprehensive Training & Competence Scheme & Service Support	✓	£
Induction Course - FSA & MI	✓	
Training Courses - point of sale system, Protection & General Insurance, Sales Skills	✓	£
e-learning package including CPD	✓	£

<b>Business Development Support</b>		
Comprehensive Support from Training & Development Managers	✓	£
Marketing Support	✓	£
AMI Membership - fees paid	✓	
Cash management & forecasting	£	£

<b>Mortgage Club Services</b>		
Broker Support Desk	✓	✓
Dedicated Business Development Managers	✓	✓
Enhanced Procurement Fees	✓	✓
Broker Zone website	✓	✓
Extensive lender panel, representative of whole of market	✓	✓
Exclusive Products	✓	✓
Branded adviser website	£	£
Prime Packaging Service	✓	✓
Access to Commercial & Buy-to-Let Mortgage Club	✓	✓
Trouble shooting difficult cases	✓	✓
Procurement Fee Management	✓	✓