



Application form – Financial Adviser School

We want to process your application as quickly as possible. It is therefore essential that all sections are completed accurately to ensure that your application can be processed efficiently.

1. Your details

Title (Mr, Mrs, Miss, Ms, Other)

Forename

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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Home address of applicant

Postcode

Correspondence address for use with all communications given or made under or in connection with the contract (if different to the above address)

Postcode

Contact details

Telephone number

Mobile number

E-mail

The Financial Adviser School is committed to ensuring that applicants are considered fairly and do not face unnecessary barriers because of their ethnic origin, national identity, gender, disability, sexual orientation, religion or other belief, age and socio-economic background.

Please state your nationality

Do you have a valid work and/or study visa for the United Kingdom (✓)	Work	Study	Both
Will you require sponsorship to work in the United Kingdom? (✓)	Yes	No	

If you are not of UK or EU nationality, please state the purpose that you entered the UK and your current immigration status.

If English is not your first language, what is your English language competency?

The Financial Adviser School welcomes applications from disabled people and will try to meet their needs wherever it reasonably can. The information that you give on this application form will help FAS to do this and plan the support and adjustments to be put in place for you. Disability has a broad definition which can include physical and sensory impairments, specific learning difficulties (e.g. dyslexia), mental health difficulties and other medical conditions which are likely to have a long-term effect on you.

Do you have a disability? Yes No

If Yes, please give details



2. Programme applying for

Programme (Please tick which programme you are applying for) (✓)

Level 6 Full Programme

Pension Transfers

Long Term Care and Later Life Planning

Managing Investments

Taxation, Trusts and Tax Compliance

3. Qualifications

Please submit your current CV as part of your application and include details of existing qualifications in financial advice. We require certified copies of your certificate(s) with your application form.

Qualification	Provider name	Result	Dates

4. Enclosures

Please enclose the following with your application: (✓)

- | | | |
|---|-----|----|
| a. Curriculum Vitae | Yes | No |
| b. Certified copies of your existing qualifications in financial advice | Yes | No |
| c. Completed copy of the Recognition of Prior Learning form | Yes | No |
| d. Signed copy of our Data Consent Form | Yes | No |

5. Signature

Please sign below to indicate that the information you have provided is correct.

Applicant's
signature

Date

D	D	M	M	Y	Y	Y	Y
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The Financial Adviser School will keep the information you supply to us in accordance with (1) the FAS privacy notice, (2) to provide the programme, and (3) to keep you and your sponsoring firm (as outlined in section 6 on the next page) updated with changes to the service we offer.

Please note: You will only need to complete section 6 if you are being sponsored by a firm through the programme.



6. Sponsoring firm

Please complete the following regarding your firm and sign below.

Firm name in full

Principal's name

Legal Entity

(Sole Trader, Partnership (state number of partners), Limited Liability Partnership, Limited Company, Public Limited Company, Other (please state))

Address

Postcode

FCA regulatory number

Correspondence address if different from above

Postcode

Firm's contact details

Telephone number

Mobile number

E-mail

Throughout the programme we will keep you updated on your learner's progress. If you would like someone else within your firm to also receive this information, please fill in their details below:

Name	
Job title	
E-mail	
Telephone number	

7. Signature

Please sign below to indicate that the information you have provided is correct.

Applicant's signature

Date

D		D		M		M		Y		Y		Y		Y
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Name of applicant





Data consent form

Consent to gather special category data

As detailed within the FAS Privacy Notice, which can be found at www.quilterfaschool.co.uk/privacy-policy/, in some instances, it is necessary for us to collect more sensitive information (such as health or lifestyle information) which is called special category data. This is to allow us to provide financial services training. This is where we need to gather your consent to the collection and processing of this data. You can withdraw your consent at any time to us processing this data, however, this may mean that you can no longer access the service or product the information was gathered for. Please return this notice with your application form.

By ticking this box you are giving consent for special category personal data to be collected and stored in order for us to provide financial services training.

Date

D	D	M	M	Y	Y	Y	Y
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Electronic marketing

By ticking this box you are giving consent for special category personal data to be collected and stored in order for us to provide financial services training.

I do not wish to receive electronic marketing of relevant products or services

Signed by