

**Finance Brokers, Mortgage Originators & Mortgage Managers Addendum**

1. Please break down by percentage, the types of services offered by your practice:-

1. Loans	(a)	%	
(a) Housing Domestic	(a)	%	
(b) Investment Property	(b)	%	
(c) Industrial & Commercial property	(c)	%	
(d) Working Capital	(d)	%	
(e) Bridging	(e)	%	
(f) Reverse Mortgages	(f)	%	
(g) Other – please specify	(g)	%	
2. Leasing & Hire Purchase		Commercial	Domestic
(a) Motor Vehicle	(a)	%	%
(b) Machinery, Plant & Equipment	(b)	%	%
(c) Computers & Computer Equipment	(c)	%	%
(d) Aviation	(d)	%	%
(e) Other - please specify	(e)	%	%
3. Other Activities			
(a) Insurance Agents	(a)	%	
(b) Insurance Brokers	(b)	%	
(c) Financial Planners	(c)	%	
(d) Deposit Bonds	(d)	%	
(e) Other – please specify	(e)	%	
<b>TOTAL</b>		%	

2. Please attach a list of all Lenders you utilise and specify whether you are accredited. Please also breakdown by percentage the sources of finance used by your practice:-

(a) Banks	(a)	%
(b) Non-Bank Financial Institutions	(b)	%
(c) Solicitors' Funds	(c)	%
(d) Other – please specify	(d)	%

3. Do you disclose all commissions received? YES  NO
4. Do you provide letters of credit? YES  NO
5. Do you have the authority to approve/settle loans or arrange valuations on behalf of lenders? YES  NO
6. Do you provide any services or advice in respect of reverse mortgage products? YES  NO

I/We hereby declare that the above statements are true, that I/We have not suppressed or mis-stated any facts, and that should any of this information alter between the date of this Addendum and the inception date of the proposed insurance, I/We will give immediate notice to the Underwriters. I/We also confirm that I/We am/are authorised to act for and on behalf of all persons who may be entitled to indemnity under the proposed insurance and that I/We complete the proposal and this Addendum on their behalf.

Name(s) of Firm .....

Date: .....

Signed: .....