



# Modular Website

Application Form



Please note this application is for the Quay Modular Website.

In order to complete the application process you will need to provide details about your business including membership numbers for any Regulatory and/or Professional bodies.

The information collected using this electronic form is the minimum required for us to establish a website for you. Once your application is accepted you will be provided with an information pack. This pack contains details about your website and how to gain access to the Modular Website Edit Suite. This technology allows you to add additional features, including e-commerce functionality.

Access to the functionality offered by the Edit Suite is available to you free of charge, 24 hours per day.

### **Contact information**

Quay Software  
Thorley Wash Business Centre  
Thorley Wash  
Bishop's Stortford  
Herts CM23 4AT

Tel: 0870 224 7272  
Fax: 0870 224 7273

Email: [passwords@quaysoftware.co.uk](mailto:passwords@quaysoftware.co.uk)  
Email: [enquiries@quaysoftware.co.uk](mailto:enquiries@quaysoftware.co.uk)  
Email: [sales@quaysoftware.co.uk](mailto:sales@quaysoftware.co.uk)

### **For office use only**

Sales reference no.

## The look - choose your design

Below is a selection of the template designs available for your Modular Website. To enable us to create your website please consider the designs shown and choose just one of them. As part of your license fee you will gain access to the Edit Suite facility. This allows you to change the template design used for your website as often as you wish. This means the choice of template you now make need not be final. All template designs offer the scope for the Modular Website to add extra visual aspects to your website such as business logo and / or photographs of the advisers employed within the business. These features are charged for separately. Details of the charges levied can be found in the 'Design Options' section of this application.

As part of the design services offered by Quay, changes can be made to an existing template design so that it better reflects your needs. It is even possible for new designs to be created that reflect your business brand. These design services are offered at additional cost, details of which are available from Quay Software. Please call us on 0870 224 7272 for further details.

Please indicate the design of your choice by ticking the appropriate box

**No top bar advertising designs**



**No testimonials designs**



**Top bar advertising and testimonials designs**



## About your business

Please complete as much information as possible about your business.

These details will be entered into our secure edit suite. You will then be sent a user name and password, which will enable you to modify the information that we have entered or add any additional information.

### Business details

Business name	<input type="text"/>
Main business address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>

### General enquiry details

Contact name	<input type="text"/>
Contact email address	<input type="text"/>
Business telephone number	<input type="text"/>
Business fax number	<input type="text"/>
Do you have an existing domain name (website address)?	<input type="radio"/> Yes <input type="radio"/> No
Website address	<input type="text" value="http://www."/>

### Details about your business

Year of establishment	<input type="text"/>
Total number of staff	<input type="text"/>
Current number of advisers	<input type="text"/>
Number of offices	<input type="text"/>
Please indicate the service coverage offered	<input type="radio"/> Local <input type="radio"/> National <input type="radio"/> International
Charging methods	<input type="radio"/> Commission <input type="radio"/> Flat Fee <input type="radio"/> Hourly rate <input type="radio"/> Discounted
Do you offer services to people with:	Restricted sight? <input type="radio"/> Yes <input type="radio"/> No      Severe hearing difficulties? <input type="radio"/> Yes <input type="radio"/> No
Do your premises offer disabled access?	<input type="radio"/> Yes <input type="radio"/> No

### Regulatory information

Is the business authorised under FSA&M 2000?	<input type="radio"/> Yes <input type="radio"/> No	FSA registration number	<input type="text"/>
Are you a member of an IFA Network?	<input type="radio"/> Yes <input type="radio"/> No		
Name of the Network	<input type="text"/>		
Is the business a member of MCCB	<input type="radio"/> Yes <input type="radio"/> No	Mem no.	<input type="text"/>
Is the business a member of GISC	<input type="radio"/> Yes <input type="radio"/> No	Mem no.	<input type="text"/>
Do you have a current consumer credit license that covers the business you undertake?	<input type="radio"/> Yes <input type="radio"/> No	CCL number	<input type="text"/>
Are any staff members of the following organisations?	IFAP <input type="radio"/> Yes <input type="radio"/> No	LIA <input type="radio"/> Yes <input type="radio"/> No	IFP <input type="radio"/> Yes <input type="radio"/> No
	SOFA <input type="radio"/> Yes <input type="radio"/> No	Search IFA <input type="radio"/> Yes <input type="radio"/> No	

## Design options

All template designs offer the scope for the Quay Modular Website to add extra visual aspects to your website such as business logo, adviser photographs and "re-skins". These features are charged for separately.

If you wish to include any of these additional design options please complete this section and tick the sections you are interested in. A consultant will contact you to discuss these and a tender will be produced for you to return if you decide to take them up. Options 1-3 are at a fixed cost. Options 4 and 5 are dependent on your requirements but we have shown a likely cost as an indication of what you would expect to pay for these.

### 1. Addition of business logo and up to 3 Adviser photographs on your website template.

Likely cost

Do you wish to include this option?  Yes  No

### 2. Creation of an animated version of existing business logo and its inclusion on your website

(including up to 3 photographs)

Likely cost

Do you wish to include this option?  Yes  No

If you would like to add more than three Adviser photographs to either of the options above these are charged at £10 + VAT each)

Do you wish to include this option?  Yes  No

How many additional photographs?

### 3. Addition of your existing logo shown as a 'Watermark' on the background to each page of your website

Likely cost

Do you wish to include this option?  Yes  No

### 4. Reskin

(We can create a design for your website that is unique and branded for your business. This generally entails three days work and will entail working with a Quay Software designer. Please see below or visit our web site to examples of other businesses that have had their sites reskinned)

Likely cost

Do you wish to include this option?  Yes  No



## Design options (continued)

### 5. Splash page

(An animated landing page when your site opens to welcome your visitors. Please see our website at: <http://www.quaysoftware.co.uk/products/modular/design/splash.htm> for examples)

Likely cost

Do you wish to include this option?  Yes  No

## Pricing

The Quay Modular Website options are priced as follows:

### 1. Basic website 'Brochure' model

Cost per month

Features:  Home page  Introduction  Profile  
 Services  Testimonials  Contact us

Do you wish to include this option?  Yes  No

### 2. Modular enhancements

Each of these enhancements are priced at £10 per month

Do you wish to include any of these options?

<input type="text" value="Investment guides"/>	<input type="radio"/> Yes	<input type="radio"/> No
<input type="text" value="Calculators"/>	<input type="radio"/> Yes	<input type="radio"/> No
<input type="text" value="Research Tools"/>	<input type="radio"/> Yes	<input type="radio"/> No

### 3. Basic E-commerce module

Cost per month

Features:  Share trading (IMIWeb)  Term and critical illness quotes (Weblines)  
 Fund supermarkets (cofunds, Skandia)  Traded endowments  
Research (Morningstar)  Mortgages, current accounts, savings  
accounts, credit cards, personal loans (Intelligent Finance)  
 Utility switching (USwitch)  News (Ananova)  
 Books & DVDs (Amazon)

Do you wish to include this option?  Yes  No

### 4. E-commerce Modular enhancements

Each enhancement is individually priced at the monthly cost

Do you wish to include any of these options?

<input type="text" value="Investahead - £25.00"/>	<input type="radio"/> Yes	<input type="radio"/> No
<input type="text" value="TriGold-mortgages - £30.00"/>	<input type="radio"/> Yes	<input type="radio"/> No
<input type="text" value="Network Data - mortgages (includes off-line system) - £80.00"/>	<input type="radio"/> Yes	<input type="radio"/> No
<input type="text" value="Weblines enhanced service - £10.00"/>	<input type="radio"/> Yes	<input type="radio"/> No

### 5. Back Office Integration Module

Cost per month

Features:  Client log in allows access to portfolios 24/7 from anywhere in the world  One user back office system  Daily price feed and fund fact sheets from Financial Express Prestel worth over £30,000 per annum

## Confirmation and direct debit mandate

All charges and license fees are collected by direct debit. The direct debit form should be completed with your bank details and returned to us with this application (see form below).

Please detach and retain the direct debit guarantee for your records.




### Before you sign the declaration below, have you...

- completed the form to the best of your knowledge?
- selected a design template?
- signed the direct debit?
- read the terms and conditions at the end of this document?

I wish to apply for the Quay Modular Website. I confirm I have read and accept the Terms and Conditions set out in QMW T&C (Dec 03)

Signed by \_\_\_\_\_ Date \_\_\_\_\_

If you do not wish to be contacted regarding related products and services, please tick this circle

	<b>Instruction to your Bank or Building Society to pay by Direct Debit</b>	
<small>Please fill in the whole form including official use box using a ball point pen and send it to, My Money Adviser Ltd, Harbour Island, 34 Harbour Exchange Square, London E14 9GE</small>		
<b>Name and full postal address of your Bank and Building Society</b>	<b>Originator's Identification Number</b>	<b>FOR MY MONEY ADVISER LTD OFFICIAL USE</b> This is not part of the instruction to your Bank or Building Society.
To: The Manager <span style="float: right;">Bank/Building Society</span>	6   0   0   2   9   1	
Address		
Postcode		
<b>Name(s) of Account Holder(s)</b>		
<b>Bank/Building Society account number</b>		
<b>Branch Sort Code</b>		
<b>Reference Number</b>		
<small>Banks and Building Societies may not accept Direct Debit Instructions for some types of account</small>		
This guarantee should be detached and retained by the Payer.		
<b>The Direct Debit Guarantee</b>		
<ul style="list-style-type: none"><li>■ This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society.</li><li>■ If the amounts to be paid or the payment dates change My Money Adviser Ltd will notify you 7 working days in advance of your account being debited or as otherwise agreed.</li><li>■ If an error is made by My Money Adviser Ltd or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.</li><li>■ You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to us.</li></ul>		