

Our Terms of Business



Initial disclosure details

This document sets out how we will deal with you in the provision of services for arranging your purchase. Alliance Real Estate Investments provides a Real Estate sourcing and introductory service. We will ensure when dealing with you, we act in your best interests and apply the professional standards for the introduction of this type of business. We are not regulated by the FCA, SRA, FRC or PRA. Our panel of professionals are regulated and will disclose key information to you regarding your specific transaction. When acting for you, we will source companies from the market that are suitable to the requirements you disclose to us. When the preferred provider(s) of the requested services has been agreed, we will provide you with information and introductions to them. They will ensure you understand your responsibilities and commitments to them, before proceeding. This will include disclosure of the key contract terms, the risks and all charges payable by you. We will not proceed until you have read and understood all the contractual documents.

What do we mean by “Your Personal Data”?

Your Personal Data means any information that describes or relates to your personal circumstances.

Your Personal Data may identify you directly, for example your name, address, date of birth, National Identity number.

Your Personal Data may also identify you indirectly, for example, your employment situation, your physical and mental health history, or any other information that could be associated with your cultural or social identity.

In the context of providing you with assistance in relation to your Mortgage/Finance and/or Insurance requirements.

Your Personal Data may include:

- Title, names, date of birth, gender, nationality, civil/marital status, contact details, addresses and documents that are necessary to verify your identity.
- Employment and remuneration information, (including salary/bonus schemes/overtime/sick pay/other benefits), employment history.
- Bank account details, tax information, loans and credit commitments, personal credit history, sources of income and expenditure, family circumstances and details of dependents.
- Any pre-existing mortgage/finance and/or insurance products and the terms and conditions relating to these.

What happens to Your Personal Data when it is disclosed to us?

- Record and store Your Personal Data in our paper files, mobile devices and on our computer systems (websites, email, hard drives, and cloud facilities). This information can only be accessed by employees and consultants within our Firm and only when it is necessary to provide our service to you and to perform any administration tasks associated with or incidental to that service.
- Submit Your Personal Data to Mortgage Lenders/Commercial Lenders and/or Insurance Product providers, Solicitor's, Architects, Realtors, Estate Agents and Development companies, both in paper form and on-line via a secure portal. The provision of this information to a third party is essential in allowing us to progress any enquiry or application made on your behalf and to deal with any additional questions or administrative issues that providers may raise.
- Use Your Personal Data for the purposes of responding to any queries you may have in relation to any property purchase/mortgage/finance product or insurance policy you may take out, or to inform you of any developments in relation to those products and/or policies of which we might become aware.
- Your Personal Data will be kept securely with the company. You have the right to request any data to be corrected, deleted or restricted for use within legal boundaries. If we are required to legally provide your data to specific authorities, we will do so under provisions set out under UK law.

Your Personal Data and information

By signing this form, I/we confirm the information given is accurate and that you, or any company to whom you submit our details, may use and disclose my data as described. I/we understand that either your company or those deemed appropriate may contact me/us by post, phone, email or other means as deemed necessary. I/we also give permission to Alliance Real Estate Investments Ltd and its holding company, Alliance Group Investments Ltd, or the introducer, to search files or credit reference agencies which will keep a record of the search. I/we also provide permission for identity checks to be performed to verify documents provided. I/we acknowledge that multiple credit searches may affect my ability to obtain credit elsewhere.

Our charges

Our fees are detailed below and vary depending on the type of transaction undertaken. The fee will be payable upon completion of a property purchase. This fee relates only to services provided by Alliance Real Estate Investments Ltd as a packager and introducer for your property transaction. All other fees relating to a property purchase are communicated separately and transparently beforehand. Fees charged by other providers are separate from this agreement.

The service package selected is determined by your requirements for each property transaction. This package is confirmed to you in your quotation. Please tick the relevant package selected as summarised below:

Platinum	<input type="checkbox"/>	Gold	<input type="checkbox"/>	Silver	<input type="checkbox"/>	Bronze	<input type="checkbox"/>
Property sourcing		Property sourcing		Property sourcing		Property sourcing	
Mortgage funding		Mortgage funding		Insurance		Solicitor	
Insurance		Insurance		Solicitor		Accountant	
Solicitor		Solicitor		Accountant		Estate Agency	
Accountant		Accountant		Estate Agency			
Interior designer		Estate Agency					
Estate Agency							
Exclusive Benefits							
£3000 incl. VAT		£2000 incl. VAT		£750 incl. VAT		£500 incl. VAT	

Your consent

We intend to rely on this document for the services we provide to you and request that you provide your agreement to the Our Charges section above. For your own benefit and protection, you should read these terms carefully before signing them. If you do not understand any point, please ask for further information.

You and the adviser now agree that:

1. You engage them to act for you to help you obtain the property.
2. In return for providing these services to you, you will pay the charge outlined in "Our Charges".
3. The fee is agreed to be paid on completion of the property purchase.
4. You will not withhold a payment.
5. This agreement is governed by English Law.
6. An invoice/receipt for payment will be issued for services provided.

Our service standards

Our aim is to provide you with a professional and confidential service that delivers the highest possible standards. However, there may be occasions where you feel this has not been achieved and should you wish to make a complaint about any aspect of the service we provide to you, you can do this by writing to Complaints Handler, Alliance Real Estate Investments, 100 Bishopsgate, London, EC2N 4 AG or by telephoning us on +44 207864 1661 where we will try to resolve your concern at the earliest time possible.

Terms of business and initial disclosure agreement

I hereby grant Alliance Real Estate Investments Ltd permission to proceed as per terms outlined in this document:

Signed: _____

Print Name: _____

Date: _____