

JOIN THE PRIDE FAQs

We want to make life as easy as possible for our pride! That's why we've collected key questions and answers all in one place for you.

WHEN WILL I GET ACCESS TO SYSTEMS?

Our key platforms include the Training Matters, The Hub and Toolbox.

- Training Matters – our event booking system that also encompasses testing and CPD tracking.
- The Hub – is a collection of resources to help grow your business including compliance documentation, copies of all communications sent from the Network, pre-approved templates to send to your clients to generate new business and much more.
- Toolbox – our award-winning back-office system that guides you through the sales process with your clients safely and compliantly. You can learn more about it [here](#).

You will receive access to Training Matters at the start of your journey, so you can complete the tests required during your application process.

Log-ins for the Hub and Toolbox will be provided for you when you have officially joined the pride.

WHERE CAN I FIND OUT DETAILS OF RETENTION, FEES AND PI?

Please consult your Regional Sales Director (RSD) and they will be able to clarify this for you.

CAN I START DEVELOPING MY MARKETING MATERIALS YET?

Yes, our Financial Promotions team can support you in developing your website and preparing stationery in advance of your application being approved. Please contact financial.promotions@primis.co.uk to find out more.

HOW CAN I FIND OUT HOW EACH TEAM CAN HELP ME?

We have a variety of teams who can support you with different aspects of your business.

- Regional Sales Director (RSD) – your dedicated RSD will support you in developing and growing your business to help achieve your goals.
- Area Supervision Manager (ASM) – your dedicated ASM will guide you in achieving the right customer outcomes, reaching and maintaining competency and support you with the training and competency scheme.
- Broker Services On-Boarding – the team will help on-board you, review and sign off your financials. They will complete any future changes you may have once authorised, such as change of address, permissions or structure of your company and adding trading names. The team will also help you bring on board any additional support, such as administrators.
- Broker Services Support – the team will be able to support you in maintaining your data within Toolbox, keeping track of your provider agency codes, as well as dealing with any network leavers and their third party references.

- Financial Promotions – our FP consultants will provide you with advice on advertising, marketing and social media.
- IT Helpdesk – the helpdesk are here to find you answers and solutions to your IT queries.
- Training – our training team are here to provide you with world class, informative sessions on a wide variety of topics so you're equipped with the knowledge you need to provide fantastic advice.
- Experts Helpdesk – the team are on hand to assist you with cases you're struggling to place, including mortgages, protection and general insurance. They can also provide guidance on sourcing queries.
- Customer Outcomes Review Team (CORT) – CORT are here to support you with initial case checks, provide constructive feedback and to support you in delivering good customer outcomes.
- Fees – the team are able to advise on commission related queries.

HOW CAN I CONTACT TEAM MANAGERS?

Please consult your Regional Sales Director (RSD) and they will be able to arrange a call with the team manager you wish to speak to.

WHERE CAN I FIND THE EVENTS CALENDAR?

You can find the events calendar within Training Matters. The training team are also available to answer your questions, please contact them at training@primis.co.uk.

We run induction sessions throughout the year, which you will be invited to join once your application has been accepted. In addition there are variety of sessions organised each month with subject matter experts. Your RSD can share the details of these with you.

We promote our events on social media. Like, connect or follow us to find out more:

- **Facebook**
- **LinkedIn**
- **Twitter**

CAN'T FIND WHAT YOU'RE LOOKING FOR?

If the FAQs above haven't provided you with a solution, please contact your Regional Sales Director (RSD). Alternatively, here are some key contacts:

Broker Services

01249 467 591

Jo Blackburn, Operations Director – Jo.Blackburn@primis.co.uk or 07375 698989
Sam Howard, Head of Broker Services – Sam.Howard@primis.co.uk or 07968 604872

On-boarding Queries - Robyn Hollamby-Jones, Broker Services Manager – Robyn.Hollamby-Jones@primis.co.uk, 01249 467 555

Monitoring Queries – Emma Benoit, Broker Services Monitoring Manager – Emma.Benoit@primis.co.uk or 07376030583

Systems Access Queries - Claire Watts, Claire.Watts@primis.co.uk, 01249 467 526

CORT (Customer Outcomes Review Team)

Pre-CAS - James Hemings at James.Hemings@primis.co.uk or on 01249 467 570

Commissions

fees@primis.co.uk 01249 467 594 or 0330 303 0242

Nick Dean, Commissions and Fees Manager – Nick.Dean@primis.co.uk or 01249 467546
Melissa Mowat, Senior Commissions Consultant – Melissa.Mowat@primis.co.uk or 01249 467 577

Customer Complaints

complaints.solihull@primis.co.uk or 0121 767 1139

Sue Smith, Customer Resolution Support – Sue.Smith@primis.co.uk
Eleanor Barber, Compliance Assistant – Eleanor.Barber@primis.co.uk

IT

0333 320 2208

Simon Hinsley, Head of IT Services FS – Simon.Hinsley@primis.co.uk or 01249 467 510
Stephen Bowring, IT Support Manager – Stephen.Bowring@primis.co.uk

Training

training@primis.co.uk

Compliance

compliance@primis.co.uk

Helen Duhig, Head of Compliance Policy – helen.duhig@primis.co.uk or 0121 767 0954

Money Laundering Reporting Officer (MLRO)

mlro@primis.co.uk

MLRO can offer guidance relating to Customer Identification and Verification, EiDV, PEPs, Suspicious Activity Reports, Law Enforcement Enquiries, money laundering concerns regarding cases including deposits

David Dilkes, Head of Financial Crime Prevention - David.Dilkes@primis.co.uk
Tahera Begum, Deputy MLRO - Tahera.Begum@primis.co.uk

Data Protection Office (DPO)

dpo@primis.co.uk

Raj Lyall, Data Protection Officer – Raj.Lyall@primis.co.uk

Investigations

investigation@primis.co.uk

Investigations can assist with queries or concerns regarding mortgage and protections cases related to documents or suspected fraud, lender queries/concerns, ongoing investigations, panel removals and warning letters, requests from lenders/providers for information or additional documents, case declines.

Craig West, Senior Financial Crime Prevention Officer - Craig.West@primis.co.uk
Christopher Wake, Senior Financial Crime Prevention Officer -
Christopher.Wake@primis.co.uk

Experts

experts@primis.co.uk or 0121 767 1065

Caroline Cartmell, Product Desk Team Leader – Caroline.Cartmell@primis.co.uk or 0121 767 1065

Financial Promotions

financialpromotions@primis.co.uk or 0330 303 0234

Jamie Bowyer, Financial Promotions Consultant – Jamie.Bowyer@primis.co.uk or 07376 035 424

Events

events@primis.co.uk

Andrea Moore, Events Manager – Andrea.Moore@primis.co.uk or 0121 767 1017

Supervision

Supervision@primis.co.uk

Kate Ashton, Director of Training and Competence – Kate.Ashton@primis.co.uk or 07703 678 041. Individual ASMs will be allocated at the start of the journey once joined.