

Date:



# TrigoldCrystal Websites I Web Plus Package

## Web Plus Package includes:

- Hosting (Website Only)
- Addition of Your Site Sourcing (Web Tools Plugin)
- Standard Content (Includes 3 standard Main Menu Tabs)  
Home | About us | Contact us [See section 3 for more info](#)
- Optional Content (Includes 4 Main Menu Tabs of your choice)
- Addition of company logo **Don't have a logo? See section 5**
- Change to company colour scheme
- Change to regulatory information [Taken from sections 1 & 2](#)
- Addition of company contact details
- Addition of Latest News RSS Feed
- Addition of Interactive map [Taken from section 2](#)

## Section 1.

### Your Personal & Company Details:

Please enter your personal and business details.

Name:	Email:	Phone:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Fax:	Business Name:	Business Type:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Address:	Registered Office Address (if different):	Company Registration Number:
<input type="text"/>	<input type="text"/>	<input type="text"/>
		FSA Number:
		<input type="text"/>
		Network/Compliance Service Provider:
		<input type="text"/>

## Section 2.

### Your Website Details:

Please enter your basic website details.

Email to be used on your website:	Phone number to be used on your website:	Fax number to be used on your website:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address to be used on website:	Template Choice:	
<input type="text"/>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 See <a href="http://www.trigoldcrystal.co.uk">www.trigoldcrystal.co.uk</a> for details	
	Domain name(s) you wish to use for your site:	
	<input type="text"/>	
	Other Notes:	
	<input type="text"/>	

Details given in section 2 & 3 will be used for the statement in the footer of your website. **Please ensure you have provided all the required information.**

## Section 3.

### General Menu Tabs

These are the general menu tabs and pages included in your standard website build.

- Home       About us       Contact us

### Choose Your Custom Menu Tabs

Included in your standard website build are 4 custom menu tabs, which can be chosen from the list below. Each tab is also a web page and can include up to 4 sub pages.

- Mortgages       Protection       Insurance       Wealth Management       Debt  
 Loans       Equity Release       Commercial       Bridging Finance       Wills
- Other menu tab (Please enter details)

**Need more than 4 menu tabs?** Additional menu tabs (including 4 sub pages) may be added to your site for **£100 per menu tab.**

## Choose Your Custom Web Pages

Included in your standard website build are 16 custom web pages in addition to the 4 menu tab pages, which can be chosen from the list below. Enter the name of the Menu Tab where you would like the page to appear in the field to the right of the page name.

<input type="checkbox"/> First Time Buyer	<input type="text"/>	<input type="checkbox"/> Debt Management	<input type="text"/>	<input type="checkbox"/> Unemployment Cover	<input type="text"/>
<input type="checkbox"/> Remortgage	<input type="text"/>	<input type="checkbox"/> IVA	<input type="text"/>	<input type="checkbox"/> Mortgage Payment Benefit	<input type="text"/>
<input type="checkbox"/> Buy to Let	<input type="text"/>	<input type="checkbox"/> PTD	<input type="text"/>	<input type="checkbox"/> Health Cover	<input type="text"/>
<input type="checkbox"/> Adverse Credit	<input type="text"/>	<input type="checkbox"/> Bankruptcy	<input type="text"/>	<input type="checkbox"/> Private Medical	<input type="text"/>
<input type="checkbox"/> Lifetime Mortgages	<input type="text"/>	<input type="checkbox"/> DRO	<input type="text"/>	<input type="checkbox"/> Perm Health Insurance	<input type="text"/>
<input type="checkbox"/> Home Reversion	<input type="text"/>	<input type="checkbox"/> Debt Consolidation	<input type="text"/>	<input type="checkbox"/> Investment Mgmt.	<input type="text"/>
<input type="checkbox"/> Drawdown Schemes	<input type="text"/>	<input type="checkbox"/> Buildings Insurance	<input type="text"/>	<input type="checkbox"/> Discretionary Services	<input type="text"/>
<input type="checkbox"/> Interest Only Mortgages	<input type="text"/>	<input type="checkbox"/> Contents Insurance	<input type="text"/>	<input type="checkbox"/> Advisory Services	<input type="text"/>
<input type="checkbox"/> Home Income Plans	<input type="text"/>	<input type="checkbox"/> Landlord's Insurance	<input type="text"/>	<input type="checkbox"/> Financial Plan Process	<input type="text"/>
<input type="checkbox"/> Commercial Loans	<input type="text"/>	<input type="checkbox"/> Personal Insurance	<input type="text"/>	<input type="checkbox"/> Wealth Mgmt. Platform	<input type="text"/>
<input type="checkbox"/> Property Dev Finance	<input type="text"/>	<input type="checkbox"/> Private Health Care	<input type="text"/>	<input type="checkbox"/> Inheritance Tax Planning	<input type="text"/>
<input type="checkbox"/> Comm & Dev Finance	<input type="text"/>	<input type="checkbox"/> Commercial Insurance	<input type="text"/>	<input type="checkbox"/> Pension Transfer	<input type="text"/>
<input type="checkbox"/> Commercial Mortgages	<input type="text"/>	<input type="checkbox"/> Employers Liability	<input type="text"/>	<input type="checkbox"/> Annuities	<input type="text"/>
<input type="checkbox"/> Development Finance	<input type="text"/>	<input type="checkbox"/> Life Assurance	<input type="text"/>	<input type="checkbox"/> Tax Planning	<input type="text"/>
<input type="checkbox"/> Mezzanine Finance	<input type="text"/>	<input type="checkbox"/> Critical Illness Cover	<input type="text"/>	<input type="checkbox"/> Will Writing	<input type="text"/>
<input type="checkbox"/> Asset Finance	<input type="text"/>	<input type="checkbox"/> Income Protection	<input type="text"/>	<input type="checkbox"/> Useful Links	<input type="text"/>
<input type="checkbox"/> Factoring & Invoice Dist.	<input type="text"/>	<input type="checkbox"/> MPPI	<input type="text"/>	<input type="checkbox"/> Utilities	<input type="text"/>
<input type="checkbox"/> Key Person Insurance	<input type="text"/>	<input type="checkbox"/> Whole of Life	<input type="text"/>	<input type="checkbox"/> Estate Agency	<input type="text"/>
<input type="checkbox"/> Property Investment	<input type="text"/>	<input type="checkbox"/> ASU	<input type="text"/>	<input type="checkbox"/> Testimonials	<input type="text"/>
<input type="checkbox"/> Secured Loans	<input type="text"/>	<input type="checkbox"/> Business Protection	<input type="text"/>	<input type="checkbox"/> Jargon Buster	<input type="text"/>
<input type="checkbox"/> Bridging Loans	<input type="text"/>	<input type="checkbox"/> Partnership Protection	<input type="text"/>	<input type="checkbox"/> Directors & Staff Benefit	<input type="text"/>
<input type="checkbox"/> Large Loans	<input type="text"/>	<input type="checkbox"/> Business Loan Protection	<input type="text"/>		
		<input type="checkbox"/> Key Person Protection	<input type="text"/>		

Other page(s) (Please enter page name and details below)

**Need more than 20 web pages?** Additional individual pages may be added to your site for **£50 each**.

## Social Networking Links

Facebook (please provide URL)

Twitter (please provide URL)

LinkedIn (please provide URL)

## Section 4.

### Your Company Logo and Branding

When submitting this form, please ensure you have attached your company logo in order for us to apply it to your new website. Because your website is personal to you and your company, tell us the choice of colours you'd like to see as part of your brand (a theme usually correlating with your logo). Please be as specific as possible (there are many different types of RED for example!) and attach an example business card, compliment slip or letterhead.

 Logo Attached

 Branding Example Attached

Colour Description

## Section 5.

### Extra Features

Please choose any Extra website features you would like to enhance your website.

 Additional RSS Feed  
**£50.00**
 Newsletter Opt-in  
**£50.00**
 Google Analytics\*  
**£50.00**
 Image Changes\*\*  
**£10.00** (per image)

 Mortgage Calculator  
**£5.00** (per month)

\* Requires an existing account. \*\* Images must be provided.

### Third Party Services

Please choose any of our third party features you would like to enhance your website.

 General Insurance - CETA or Source  
(Select on Direct Debit Form)
 Assureweb\*\*\*

 eConveyancer

 Connect Finance

 miLoan

\*\*\* By opting to use the Assureweb Website Plug-in you agree to their terms and conditions ([www.trigoldcrystal/assureweb\\_tandc](http://www.trigoldcrystal/assureweb_tandc))

**Please note:** Additional Items may be added at any time, subsequent to the initial website build but will incur a charge of **£50**

### Purchase a Logo

Please select which logo you would like to purchase. Refer to the TrigoldCrystal Templated Logo Service document for a full list of Logos.

1     2     3     4     5     6     7     8     9     10  
 11     12     13     14     15     16     17     18     19     20

**£50.00** (each)

Company Name

Company Strapline

Setup fee

**£199.00**

Extra features:

**£**

Total website setup fee:

**£**

**Please note:** Third Party Services are included in the monthly cost and are not part of the setup fee. Please call the registrations department on **08714 23 24 24** to pay your setup fee via credit card or debit card.



Please fax this form to 0845 456 3043, email it to [registrations@trigoldcrystal.co.uk](mailto:registrations@trigoldcrystal.co.uk) or mail to: TrigoldCrystal, Subscriptions, 1st Floor, Carlton Plaza, 111 Upper Richmond Road, Putney, SW15 2TJ

## Customer Details

Title: \_\_\_\_\_ Name: \_\_\_\_\_  
 Surname: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Payers' Ref: \_\_\_\_\_

Company: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_  
 Postcode: \_\_\_\_\_

## Select your website package

### Web Plus Package

Licence fee: **£54.00 per month**  please tick

Includes Level 1 number of Searches for Your Site Sourcing and Level 1 number of Results for Best Buys Mortgage Tables.

All Prices exclude VAT.  
 Please see overleaf for Terms & Conditions.

\*By opting to use the Assureweb Website Plug-in you agree to their terms and conditions ([www.trigoldcrystal/assureweb\\_tandc](http://www.trigoldcrystal/assureweb_tandc))

### Third Party Services

General Insurance Plugin (please choose):

Source: **£10.00 per month**  please tick  
 CETA: **£10.00 per month**  please tick

Assureweb Plugin\*: **£10.00 per month**  please tick  
 eConveyancer Plugin: **£10.00 per month**  please tick  
 Connect Finance Plugin: **£10.00 per month**  please tick  
 miLoan Plugin: **£10.00 per month**  please tick  
 Mortgage Calculator: **£5.00 per month**  please tick

## Instructions to your bank/building Society to pay direct debits



Name(s) of Account Holder(s)  
 \_\_\_\_\_

Bank/Building Society account number:  
 \_\_\_\_\_

Bank/Building Society Sort Code:  
 \_\_\_\_\_

Name & full address of your Bank/Building Society  
 To: The Manager | Bank/Building Society  
 \_\_\_\_\_  
 Address:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Post Code:  
 \_\_\_\_\_  
 Trigold Reference Number:  
 \_\_\_\_\_

**Originators Identification Number:** 808275

For IFonline Ltd t/a TrigoldCrystal Ltd. Official Use Only  
 This is not part of the instruction to your Bank or Building Society

**Instruction to your Bank or Building Society**  
 Please pay IFonline Ltd t/a TrigoldCrystal Ltd. Direct Debits from the account detailed in the Instruction subject to the safeguards assured by Direct Debit Guarantee. I understand that this instruction may remain with IFonline Ltd t/a TrigoldCrystal Ltd. and, if so, details will be passed electronically to my Bank/Building Society.

Signature: \_\_\_\_\_  
 Date: \_\_\_\_\_

Banks and Building Societies may not accept Direct Debit Instructions for some types of account

This guarantee should be detached and retained by the payer

## THE DIRECT DEBIT GUARANTEE



- This Guarantee is offered by all Bank and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored by your own Bank or Building Society.
- If the amounts to be paid or the payment dates change IFonline Ltd t/a TrigoldCrystal Ltd. will notify you 5 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by IFonline Ltd t/a TrigoldCrystal Ltd. or your Bank/Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time, by writing to your Bank/Building Society. Please also send a copy of your letter to IFonline Ltd t/a TrigoldCrystal Ltd.

# TRIGOLDCRYSTAL WEB TOOLS MORTGAGE SOURCING SERVICE LICENCE TERMS AND CONDITIONS



## DEFINITIONS

**Authorised Users** - authorised subscribers to TrigoldCrystal Web Tools who have accepted these terms and paid for use of the Web Tools service.

**Web Tools Plug In** - TrigoldCrystal's consumer facing mortgage sourcing service and best buy tables supplied for use by Authorised Users by way of a plug in web service which can be incorporated into the Authorised Users own website.

**Web Tools Manager** - TrigoldCrystal's business facing platform for both the user controlled configuration of the Web Tools Plug In service and to display Sales Leads generated on the consumer facing service.

**Web Tools web service Search** - any product search undertaken by a customer via the Web Tools plug in which results in a call being made to the TrigoldCrystal web service system and a product search result returned for display on the Web tools Plug In. This includes each completed full product search, each amended full product search, each product search results page viewed and each product details page viewed from the search results.

**Customer Lead** - information about retail customers derived from TrigoldCrystal Web Tools, following the customer providing their contact information with a view to advice and or purchase of a product shown in the Web Tools Plug In Web Service.

**Web Tools Web Site** – a TrigoldCrystal template website chosen and subscribed to by the Authorised user. If required TrigoldCrystal will also manage the domain name chosen by the Authorised user.

## WHEREBY

Subscribers to TrigoldCrystal Web Tools services can purchase a Licence to access the Web Tools Plug In service and display this within their own website or within a Web Tools Website

## RESPONSIBILITIES

- TrigoldCrystal will:
- provide the TC webtools solution and provide each Authorised User with individual access to the TrigoldCrystal Web Tools Manager;
- supply Sales Lead information via the TrigoldCrystal Web Tools Manager
- Where a Web Tools WebSite is used TrigoldCrystal will provide access to the Authorised user to manage certain areas of the content of the site.

## AUTHORISED USERS WILL

- abide by these Terms and Conditions at all times;
- only set up the TrigoldCrystal Web Tools once on any URL
- pay the relevant fee in advance for continuation of access to TrigoldCrystal Web Tools;
- be able to export client records from their TrigoldCrystal account;

## RESTRICTIONS ON USE

Authorised Users may not re-sell the TrigoldCrystal Web Tools functionality to any third party. Additional licences (e.g. for use on introducers' websites) may be purchased at the appropriate licence fee. The service is provided for use by consumers not advisers of regulated mortgages.

## LICENCE FEE

### WEB TOOLS PLUG IN

Authorised Users must choose in advance the maximum number of Searches they require per calendar month (pcm) for the Web Tools Plug Ins, based on the following tiers of service, and pay the appropriate licence fee:

- Level 1 £49 - Provides up to 2,750 mortgage searches per month.
- Level 2 £99 - Provides up to 6,000 mortgage searches per month.
- Level 3 £199 - Provides up to 14,000 mortgage searches per month.
- Level 4 £299 - Provides up to 25,000 mortgage searches per month.

### WEB TOOLS WEB SITE

Authorised users will choose the Web Tools Website Package and Add ons will pay the appropriate licence and set up fees as outlined in Web Tools Web Site price list as published and updated from time to time and available on our website at [www.trigoldcrystal.co.uk](http://www.trigoldcrystal.co.uk).

The website setup fee is payable up front by credit card or debit card. The monthly licence fee will be paid by direct debit, the first monthly payment will be taken a month after the completion of the order form. Alternatively an annual subscription may be made by cheque, credit card, chaps or bacs.

### POST CONTRACT TEMPLATE CHANGE

Any change in template choice will be subject to a new build fee (currently £199.00 minimum).

### CUSTOMISATION

Any customisation of the software is chargeable at our standard charge out rates.

### MARKETING

TrigoldCrystal has the right to display your website in any marketing material produced for the benefit of the group.

## PROVISION OF THE TRIGOLDCRYSTAL WEB TOOLS

TrigoldCrystal will use reasonable endeavours to ensure the TrigoldCrystal Web Tools are available excluding outages for planned and announcement maintenance 99% of the time. Service failures should be reported to [support@trigoldcrystal.co.uk](mailto:support@trigoldcrystal.co.uk) and will be actioned between the hours of 9:00am and 5:00pm except during weekends and UK bank holidays. The service can be branded by the Customer but will always display the phrase "Powered by TrigoldCrystal" or a similar phrase.

## INDEMNITY AND LIMITATION OF LIABILITY

TrigoldCrystal suite of Web Tools are based on defined TrigoldCrystal procedures however no warranty is given regarding the accuracy of information contained therein or that the software is error free. TrigoldCrystal accepts no liability for any incorrect or inappropriate advice given by the Authorised User, or for any other inappropriate sales made by Authorised Users following the receipt of a Sales Lead. The maximum TrigoldCrystal Liability shall be the amount paid by the customer for the licence(s). Content of the Web Tools Web Site templates and sites may change from time to time and certain areas may contain user defined content and 3rd party content, as such TrigoldCrystal accept no liability for any content or for any losses or damages incurred either by the non-availability of content or for any inaccuracies of the content.

## INTELLECTUAL PROPERTY

All intellectual property rights in the TrigoldCrystal Web Tools reside and remain with TrigoldCrystal.

## TERMINATION

The Authorised User may terminate the agreement after an initial period of 12 months following 30 days prior written notice to take effect at the end of the period currently licenced. Any enhancements to the Website including webtool plug-ins constitutes a new contract that will run for 12 months and requires the notice period as detailed above. For the avoidance of doubt, Authorised Users paying an annual subscription can give notice to terminate on the anniversary of the agreement and no refund of the Licence Fee will be given. The Licence Agreement can be terminated immediately in the event that the other party is in material breach of the Agreement which cannot be remedied within 14 days of the breach. TrigoldCrystal may immediately terminate the licence and withdraw access to the TrigoldCrystal Web Tools in the event of non-payment of the licence fee.

## LATE PAYMENT INTEREST

In the event of late payment of licence fees due under this agreement TrigoldCrystal has the right to charge the Customer interest at the rate of 2% per month on all unpaid charges arising under this agreement.

## UPGRADE

TrigoldCrystal has the right to deploy upgraded versions of the Web Tools products as long as the new functionality enhances the customer experience. Major new releases of Web Tools with significantly enhanced functionality may be released as an optional service to existing customers and may be subject to an additional license fees.

## EFFECT OF TERMINATION

When an Authorised User ceases to be authorised for whatever reason, TrigoldCrystal will remove access to the TrigoldCrystal Web Tools and no further licence fee will be due.

## ASSIGNMENT

Licencee may not assign this agreement without prior written agreement of TrigoldCrystal.

## CHANGES TO THESE TERMS AND CONDITIONS

TrigoldCrystal may alter these Terms and Conditions on provision of 30 days written notice of the same.

## JURISDICTION

The Licence Agreement is governed by English Law and the parties irrevocably submit to the jurisdiction of the English Courts to settle any dispute.

## INVALID TERMS

If any of these terms is found to be invalid or unenforceable, this will not affect the validity of the remaining terms and the parties will replace the invalid term with a valid one.