

Halifax for Intermediaries Registration Process

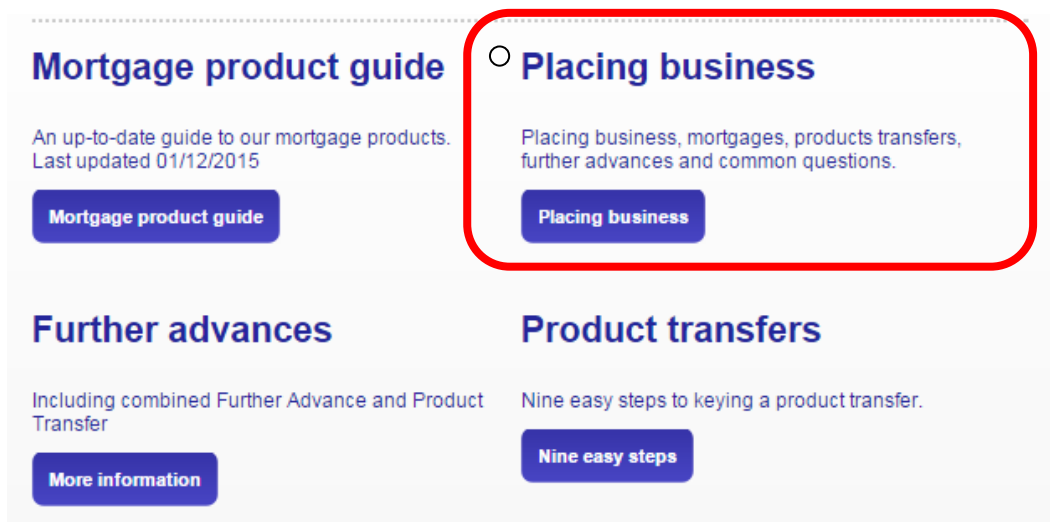
How to register with Halifax (if you are not already registered):

Please click on the following link and complete the steps required to register:

<https://www.halifax-intermediariesonline.co.uk/IntermediariesOnline/Login/Public/Login.aspx>

What to do if you are already registered with Halifax:

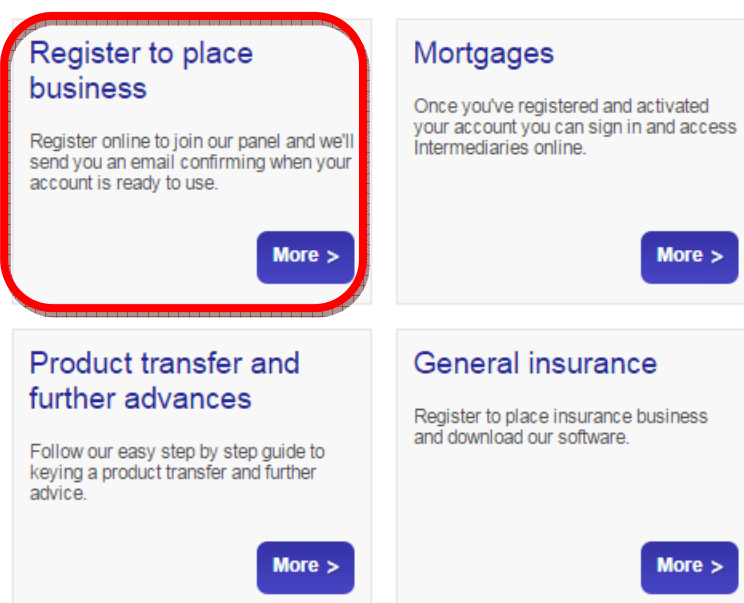
Click the following tabs -



The screenshot shows a grid of four registration options. The 'Placing business' option is highlighted with a red rounded rectangle. Each option includes a title, a brief description, and a 'More information' button.

Mortgage product guide An up-to-date guide to our mortgage products. Last updated 01/12/2015 Mortgage product guide	Placing business Placing business, mortgages, products transfers, further advances and common questions. Placing business
Further advances Including combined Further Advance and Product Transfer More information	Product transfers Nine easy steps to keying a product transfer. Nine easy steps

Followed by -



The screenshot shows four registration steps in a 2x2 grid. The 'Register to place business' step is highlighted with a red rounded rectangle. Each step includes a title, a brief description, and a 'More >' button.

Register to place business Register online to join our panel and we'll send you an email confirming when your account is ready to use. More >	Mortgages Once you've registered and activated your account you can sign in and access Intermediaries online. More >
Product transfer and further advances Follow our easy step by step guide to keying a product transfer and further advice. More >	General insurance Register to place insurance business and download our software. More >

1. Register to join our panel

Once we have all the necessary information to enable us to process your panel registration, we'll email you to confirm that your account will be available to use within 48 hours.

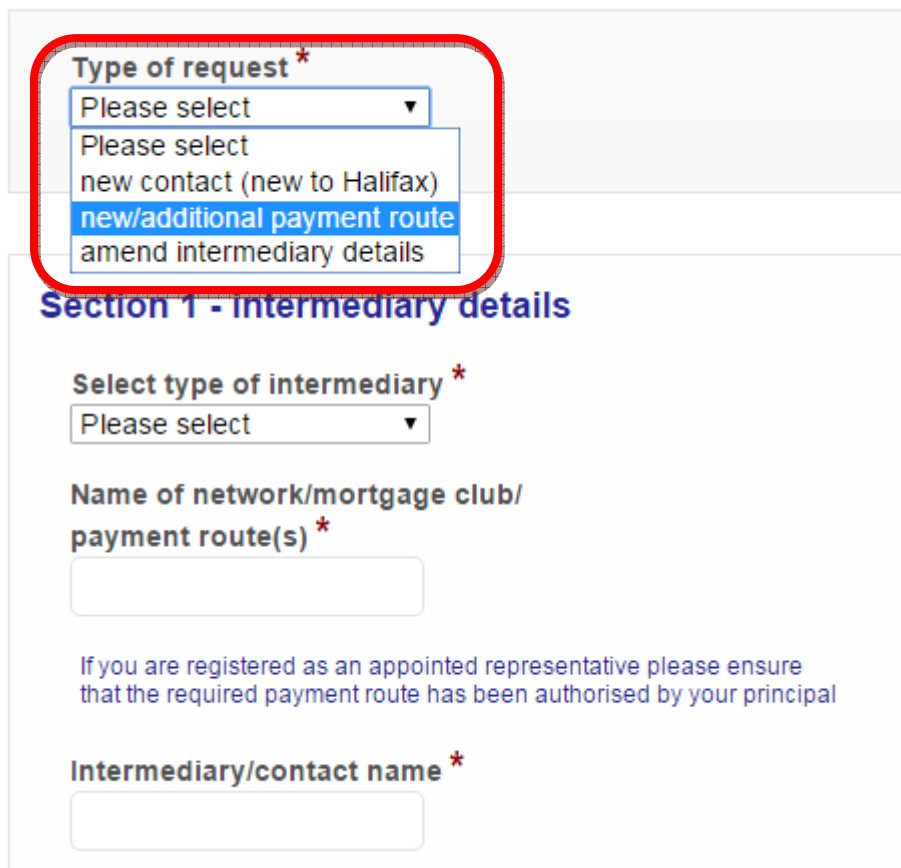
2. Register online to place business

Complete our [online registration](#) form and remember to take a note of your User ID. You'll need your User ID to complete your account activation.

3. Activate your account

We'll send an e-mail confirming a 'one time only' password. Go to [Intermediaries Online](#) and click 'activate your account using your one time password'.

Followed by -



The screenshot shows a registration form with a dropdown menu for 'Type of request *'. The dropdown is open, showing four options: 'Please select', 'Please select', 'new/contact (new to Halifax)', and 'new/additional payment route' (which is highlighted in blue). Below the dropdown is a section titled 'Section 1 - intermediary details' containing three fields: 'Select type of intermediary *' (dropdown), 'Name of network/mortgage club/payment route(s) *' (text input), and 'Intermediary/contact name *' (text input). A note below the second field states: 'If you are registered as an appointed representative please ensure that the required payment route has been authorised by your principal'.

Finally, complete the questions listed and complete by clicking submit, the process to be added to panel is usually within a few hours however, allow 24 hours before chasing.

Any questions feel free to call Dynamo for Intermediaries on 01276 601 041