



Financial Services Act 2008 - Licence

Blue Square Wealth Management Limited

Conditions

The following conditions are imposed in respect of the regulated activities undertaken:

1. The licenceholder's regulated activities are restricted to the following:

- **Class 2 – investment business - sub-classes (3) and (7)**
 - a) **For the purpose of activities undertaken under Class 2 sub-class (3) the licenceholder is only permitted to –**
 - (i) arrange deals on an advisory basis relating to long term insurance;**
 - (ii) arrange deals on an advisory basis relating to units or shares in –
collective investment schemes that are Authorised Schemes in accordance with the Collective Investment Schemes Act 2008 (or comparable collective investments schemes authorised or approved in another jurisdiction suitable for a retail investor);**
 - (iii) arrange deals on an advisory basis in unfettered life policy, pension and long term insurance contracts only where the underlying investments are –
collective investment schemes that are Authorised Schemes in accordance with the Collective Investment Schemes Act 2008 (or comparable collective investments schemes authorised or approved in another jurisdiction suitable for a retail investor).**



Blue Square Wealth Management Limited

Conditions

b) For the purpose of activities undertaken under Class 2 sub-class (7) the licenceholder is only permitted to –

(i) advise on long term insurance;

(ii) advise on units or shares in –

collective investment schemes that are Authorised Schemes in accordance with the Collective Investment Schemes Act 2008 (or comparable collective investments schemes authorised or approved in another jurisdiction suitable for a retail investor);

(iii) advise on unfettered life policy, pension and long term insurance contracts only where the underlying investments are –

collective investment schemes that are Authorised Schemes in accordance with the Collective Investment Schemes Act 2008 (or comparable collective investments schemes authorised or approved in another jurisdiction suitable for a retail investor).

2. The licenceholder is not permitted to hold client money or client assets in respect of its investment business activity.

A handwritten signature in black ink, appearing to be 'L. V.', written over a horizontal line.

Interim Chief Executive

Isle of Man Financial Services Authority

2 September 2021



**ISLE OF MAN
FINANCIAL SERVICES AUTHORITY**

Lught-Reill Shirveishyn Argidoil Ellan Vannin

REGISTRATION

To carry on the Business of Insurance Intermediary

Number: 91

Pursuant to Section 25 of the Insurance Act 2008 (as amended) the Isle of Man
Financial Services Authority hereby registers

Blue Square Wealth Management Limited

(Companies Registry Number: 133862C)

of

2nd Floor
Queen Victoria House
Victoria Street
Douglas
Isle of Man
IM1 2LF

To carry on the business of Insurance Intermediary (General Business) in or from the
Isle of Man.

This registration shall take effect on 2 September 2021.

A handwritten signature in blue ink, appearing to read 'Wendy Sayer'.

Wendy Sayer
Senior Manager – Non Life and Life Assurance





ISLE OF MAN FINANCIAL SERVICES AUTHORITY

Lught-Reill Shirveishyn Argidoil Ellan Vannin

NOTICE OF CONDITIONS IMPOSED BY THE ISLE OF MAN FINANCIAL SERVICES AUTHORITY ON BLUE SQUARE WEALTH MANAGEMENT LIMITED (“THE COMPANY”)

Using the powers available to the Isle of Man Financial Services Authority (“the Authority”) under Section 25(5)(a) of the Insurance Act 2008 (“the Act”) the Authority imposes the following conditions on the Company’s ongoing registration as a General Insurance Intermediary under Section 25 of the Act:

Condition

The Company is only permitted to intermediate on the following types of insurance products:

- Level & Decreasing Term Assurance
- Critical Illness
- Income Protection
- Family Income Benefit
- Key Person Protection
- Shareholder Protection
- Group Income Protection
- Group Life Protection

Signed:

Date: 10 November 2021

