Client Consent

This is our client agreement upon which we intend to rely. 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.

This relates to the Client Agreement Version, Document: CP1115 which appears on the front cover of the document.

☐ I/We understand and consent to the terms of this client agreement.

☐ I/We authorise you to record, store and transfer relevant personal information pertinent to my/our financial planning requirements, on a confidential basis, between such third parties and to enable you to verify our information with organisations.

We would like to be able to contact you so that we can advise you of new products that might be suited to you and any developments that might make it appropriate for us, or for third parties, to give you pro-active advice about the investments, insurance and other financial products of which we are aware.

☐ I /We authorise you, or any company associated with you, to contact us for marketing purposes as detailed above.

Where you consent to us contacting you for any of the above purposes, please indicate below how you would prefer us to contact you:

☐ Post ☐ Telephone ☐ SMS message (non-personal info only) ☐ Email (non-personal info only)

Client Name (1):	
Client Signature (1):	
Date:	
Client Name (2):	
Client Signature (2):	
Date:	

Signed for and on behalf of the firm:

Adviser Name:	
Adviser Signature:	
Date:	

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