

LETTER OF APPOINTMENT, AUTHORISATION AND CONSENT

CLIENT FULL NAME: _____

CLIENT ID: _____

DATE OF BIRTH: _____

I _____ hereby _____ mandate _____ and _____ appoint _____ and _____

MSD INVESTMENTS CC T/A PERSONIX FINANCIAL SERVICES as my Adviser and Consultants.

I instruct the relevant institutions with whom I have assurance/insurance and any and all investments to amend their records to reflect **PERSONIX FINANCIAL SERVICES** as the appointed servicing intermediary who will receive both primary & secondary commissions. I specifically instruct **PERSONIX FINANCIAL SERVICES** not to divulge any personal or commercial information to any persons & or bodies except as may be required to conclude any investment and or insurance transactions on my behalf.

I confirm that **PERSONIX FINANCIAL SERVICES** shall be acting on my behalf or in my interest and

I waive any right to privacy.

I confirm having been presented a copy of the **MSD INVESTMENTS CC T/A PERSONIX FINANCIAL SERVICES** Disclosure and Statutory Policy document.

I am aware that **PERSONIX FINANCIAL SERVICES** is obliged to report suspicious and unusual transactions to the Financial Intelligence Centre (FICA).

Astute Consent: I herewith also acknowledge the following:

- sound and proper financial advice can only be provided with full disclosure of relevant Information relating to appropriate personal, including private, information for the purposes of determining and advising on my/our financial situation and financial product experience and objectives, in the process of acquiring, servicing or maintaining any financial products, including but not limited to any information relating to or interest in any long-term insurance, unit trust or any other financial products or services, with any long-term insurer, unit trust manager or other financial institution;

OFFICE +27 21 699-0800

EMAIL info@personix.co.za

www.personix.co.za



An authorised Financial Services Provider FSP Licence No 9670/1

INSURANCE

WEALTH MANAGEMENT

PROPERTY

ACCOUNTING & ADVISORY

5 Kromboom Road,
Rondebosch Cape Town
7700, South Africa

- My/our interests shall be best served if that Information is made available to authorised financial service providers with a legitimate interest in receiving such information for those purposes.
- I/we accordingly confirm, for the purposes of providing the said sound and proper financial advice to me/us, that full permission and authority is granted to **PERSONIX FINANCIAL SERVICES** to obtain any and all such Information via The Financial Services Exchange (Pty) Ltd, trading as Astute, or any other institution providing a mechanism for the transmission of such information.

I/we herewith give consent for the long-term insurer, unit trust manager or other financial institution possessing such Information to release such Information to the said Authorised User via Astute, and I/we confirm that such Authorised User shall be acting on my/our behalf or in my/our interest and I/we waive any right to privacy only for the purposes as stated above. I agree to transfer any commission payable during the period of this appointment to the brokerage nominated above. I/we further acknowledge that this consent to obtain information on my behalf will remain effective until cancelled by me/us in writing.

CLIENT SIGNATURE: _____

DATE: _____

Company	Policy Number



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