

Date: .....

APPOINTMENT AS FINANCIAL ADVISER

I, (full names) \_\_\_\_\_ (id number)

\_\_\_\_\_ hereby confirms the appointment of **Veschini Maharaj**,

**FC0378** from **Fairbairn Consult** as my Financial Adviser who undertakes before giving advice to;

- Make all compulsory disclosures required by law.
- Having gathered all the relevant information and also establishing my objectives, will do the appropriate needs analysis.
- Provide product solutions that are suitable and affordable to me and aligned to my risk profile.
- Record, store and be able to retrieve advice given and provide me with a written copy.

**I/we understand and acknowledge the following:**

- That by this appointment, all previous intermediaries through whom my/our policies and investments were affected or serviced with any companies will no longer represent me;
- That the advice received will entitle the Financial Adviser to any future review fees
- Commissions that may be payable under our various investment/policies.

Signed at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_.

\_\_\_\_\_  
Signature of Client

\_\_\_\_\_  
Signature of Adviser

\_\_\_\_\_  
Broker Code