

# Client Consent to obtain information



Email back to: admin1@nrgupt.co.za

This form allows NRG Advisers (PTY) Ltd. to get policy/investment/unit trust information on my/our behalf for purpose of a financial needs analysis and comparison quotations. Please complete all the sections that apply to you in black ink.

## 1. Client`s personal details

Full Name:  
Surname/ Maiden:  
Identity Number: Telephone Number:  
Email Address:

## 2. Personal details of spouse / dependant

Full Name:  
Surname/ Maiden:  
Identity Number: Telephone Number:  
Email Address:

## 3. Declaration

I/we, in my/our personal capacity or, in a representative capacity for:

Entity Type:  
Entity Name:  
Entity Reg. Number:

### Give full consent to:

Adviser`s Name:  
Assistant Name:  
Assistant Email:  
Assistant Name:  
Assistant Email:  
Telephone Number: Fax Number:

so that they can give sound and proper financial advice to me/us. This includes allowing them to get any information they need from Astute (The Financial Services Exchange, trading as Astute), or any other institution allowing for the transmission of such information.

I/we also:

- Accept that the adviser named above will be acting on my/our behalf or in my/our interest.
- Agree to the long-term and short-term insurer, unit trust manager, healthcare or other financial institution releasing information to the adviser through Astute, or any other institution. This includes the disclosure of loadings and/or exclusions on risk policies and the request of paid-up quotes of pension and/or retirement annuities, Section 14 transfer of pension and/or retirement annuities and alteration quotations to enable NRG Advisers (PTY) Ltd. to supply me/us with an accurate analysis of my/our existing portfolio.
- Agree that the financial service provider and/or its authorised user(s) will be acting on my/our behalf. I/we give up any right to privacy for the purpose of getting financial information and advice. All private information must be treated as confidential by the Financial Service Provider and its authorised user(s) and may not be made public without my/our written consent.

### Companies where I/we have policies, investments and unit trusts:

Discovery	Sanlam	Nedbank	(other)
Momentum	1Life	AIG	
Metropolitan	PPS	ABSA / AIMS	
Liberty	Old Mutual	FNB	
Capital Alliance	Clientele Life	Standard Bank	
Hollard / Altrisk	Platinum Life	Guardrisk	
Astute (Financial Services Exchange)			

Client`s Signature

Spouse`s Signature

DATE

D D M M Y Y Y Y