## 15.0 Client Declaration

I/We hereby declare that:

- A Financial Services Guide (FSG) and Adviser Profile were provided to me/us and I/we have read and understood both documents
- A Credit Guide (if applicable) was provided to me/us and I/we have read and understood the document
- The information provided in this Client Data Form – Financial Planning is a true reflection of my/our personal financial situation, needs and objectives. I/We am/are not aware of any other information that would be relevant to the making of a recommendation by my/our adviser
- I/We understand that where I/we have not completed some of the sections within this Client Data Form – Financial Planning, my/our adviser is obliged to warn us that his/her advice may be based on incomplete or inaccurate information
- I/We confirm that I/we have completed the Client Risk Profile Questionnaire/Finametrica/IRESS Riskprofiler risk profiling system. I/We have read and understood my/our agreed risk profile and additionally, I/we understand that this profile will be considered in the advice process
- I/We give permission for my/our Tax File Number, as provided in section 2.1, to be retained on file by my/our adviser
- I/We give permission for this information to be retained and used for the preparation of my/our relevant advice document and in relation to any investment which I/we hold or may hold and I/we understand that any advice and/or financial planning recommendations will be based on the information supplied in this Client Data Form – Financial Planning. I/We acknowledge, in accordance with the *Electronic Transactions Act* (1999), this Client Data Form – Financial Planning may be electronically stored securely for record-keeping purposes by my/our adviser
- I/We authorise my/our adviser to contact the financial product providers that currently manage the financial products that I/we hold as listed in this Client Data Form – Financial Planning, or as otherwise notified to my/our adviser, in order for my/our adviser to ascertain my/our financial circumstances.

## 15.1 Client Authorisation

| Client 1 Signature | | | |
|---|---|---|---|
| Signature | | | Sign Here |
| Full name | | Date | |

| Client 2 Signature | | | |
|---|---|---|---|
| Signature | | | Sign Here |
| Full name | | Date | |

## Notes