Client Data Form - Financial Planning | Part A | Personal Information

9.0 Professional Advisers

	Conditor	ACCC	untant		Other:	
Company name						
Contact name						
Address						
Telephone/Fax						
Email		_				
Authority to contact	☐ Yes ☐ No	☐ Ye	es 🔲 N	No.	☐ Yes	☐ No
Additional details:	1					****
10.0 Investment Consid		Client 1		Client	2	
Are there any product providers that you would not consider when investing?		☐ Yes	□No	☐ Yes	☐ Yes ☐ No	
If yes, please provide details						
For investment purposes only, do you have any particular views concerning labour standards, environmental, social or ethical considerations?		Yes	□No	☐ Yes	s No	0
If yes, please provide details						
Additional details:						
Notes					(Const. 1974 of Chicago Const. 1974 (Chicago Chicago C	
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