

## Broker Authority

Client's Full Names			
Identity Number		Persal No.	
Physical Address			
Contact Details	(C)	(H)	(W)
E-Mail address			

I acknowledge the following:

- Appropriate financial advice can only be furnished after full and proper disclosure of relevant personal and private information about the client:
- Such information is furthermore required to either:
  - Determine my financial situation, financial product experience and financial needs and objectives
  - Acquire, maintain and service any financial product or to render related intermediary services
- Such information may include any information relating to, or interest in:
  - Long term insurance
  - Or any other financial product or service
- My interest will be best served for the stated purpose if any and all such information is provided by:
  - The financial services exchange (Pty) Ltd, trading as Astute, or any other institution providing a mechanism for the transmission of such information, or
  - Any other authorized financial services provider

I/we herewith give consent to any such authorized financial services provider in 4 above to release such information through astute or directly, to the authorized user(s) below:

Authorized User:		ID No.:	
Email Address:		Intermediary:	Matla Life Investment

I confirm that the authorized user(s) will be acting on my behalf and I hereby waive any right to privacy only for the stated purpose. all information obtained must be treated as confidential by the authorized user(s) and intermediary and may not be made public in anyway without my written consent

This consent to obtain information will remain effective for 12 months or until cancelled by me in writing

I am interested in drafting my LAST WILL AND TESTIMONY: ☐

Signed at:.....on the day of...../...../2026

Client Signature:.....

I/we have products with:

ABSA	AVBOB	Safrica	Standard bank
Assupol	Metropolitan	Old mutual group	Capitec
Old Mutual	Liberty Life	Sanlam sky	Nedbank
Sanlam	Discovery Life	Regent	FNB
Workers Life	Channel Life	Clientele Life	Momentum
Lion of Africa	Hollard	1Life Insurance	Other