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APPOINTING OF INTERMEDIARY / BROKER

I, hereby appoint **Chalford Wealth Management (Pty) Ltd** as my full-time intermediary / broker. I hereby instruct the relevant financial institutions to disclose any policy information to **Chalford Wealth Management (Pty) Ltd** and their appointed official for the purpose of revising my financial position. I declare that I am fully aware of the implication of signing this document and that the following will take effect

- My financial information will be given to **Chalford Wealth Management (Pty) Ltd** for updating purposes, and
- **Chalford Wealth Management (Pty) Ltd** will be noted as my intermediary / broker with my insurers.

Full name and surname:

ID number :

Work Phone No. :

Home Phone No. :

Mobile No. :

E-Mail Address :

Physical Address:

Signed this brokers note on _____ day of _____ 20 ____

Signature of Client

Intermediary / Broker

Name of Intermediary/Broker : _____

Annual Advice Fee : _____

Comments : _____