

Client Consent and Acknowledgement

- I/We acknowledge that the information detailed in the **Fact Find** was either entered by myself or on my behalf by the adviser and is an accurate representation of my current position and needs. The information set out in this form accurately represents my objectives, financial situation and or particular needs.
- I/We declare that we give consent for our personal information to be held on file and where indicated communication/documents to be provided electronically
- I/We hereby authorise Expert Wealth Pty Ltd AFSL 538287 to use this information for the purposes of preparing, implementing, and reviewing a Statement of Advice and related activities.
- I/We am not aware of any other information which may be relevant to the preparation of my Statement of Advice. I understand that a financial product recommendation will be based solely on the information supplied in this form within a period of thirty (30) days. Should I not proceed with implementation of the Statement of Advice I understand that it will be necessary to review the information which has been supplied.
- I/We acknowledge that if the information provided is inaccurate or incomplete, I should consider the appropriateness of the recommendations in the Statement of Advice, having regard to my personal circumstances.
- I/We acknowledge that for Insurance only advice, Expert Wealth offers the initial Insurance advice at no out of pocket cost, as we are paid brokerage by the insurers. If there are any applicable implementation costs, they will be listed in the statement of advice.
- I/We acknowledge that, If Expert Wealth are able to offer you Insurance cover and you decide to not proceed or cancel within the insurance clawback period of 2 years, then Expert Wealth will charge a cost recovery fee equal to the Insurance commission outlined in the SOA with a min of \$1850 payable, whichever is greater.
- I/We give authority for my **Tax File Number** to be kept on my client file and to be forwarded to financial institutions as requested or as necessary in connection with the financial planning advice.
- I/We understand and give consent to pay all fees outlined in the document for the preparation of the Advice and documents and acknowledge that I/we will pay the Advice preparation fee, regardless of whether I/we proceed to implement the recommendations.
- I/We acknowledge that there may be additional costs involved should I/we accept the recommended ongoing service offer relevant to this advice and/or agree to implement the advice.
- I/We understand that any costs for an ongoing service will be discussed and agreed and that we will have the opportunity to re-commit to the ongoing service relationship either at our annual review.
- I/We have been informed of the privacy policy of Expert Wealth Pty Ltd, which has been adopted to ensure the privacy and security of personal information. I/we am aware that I may request a copy from my Adviser at any time or retrieve it from the website.