



wealth matters

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Client Name(s):

Address:

.....

.....

Date:

Wealth Matters Ltd.

FSA Number: 300635

Consultant:..... Telephone: 01582 720511 Fax: 01582 730179

Dear Sir/Madam,

I/We understand that in order to provide a full financial planning service, Wealth Matters Ltd – Independent Advisers are required to have a full knowledge of all insurance/investment products held by my/our selves.

Can you please transfer the servicing rights of this/these policies (shown below) to Wealth Matters Ltd agency and provide them with a full summary of the plan(s) held by my/our selves. A questionnaire is attached.

Client Name	Policy Number	Company	Type of Policy	Fax No.

** Please see pages attached if insufficient room*

Signature:

Print:.....

Signature 2:.....

Print Name 2:.....

Date: