

Date: ____ / ____ / ____

DAVLIN
FINANCIAL PLANNING



To Whom It May Concern:

RE: Transfer of Advisor

Client Name(s): _____

Policy/Account Number: _____

I/We hereby request that the above mentioned policy\account have the adviser transferred with immediate effect to my Financial Planner – **David Linco, who operates under Consultum Financial Advisers Pty Ltd with AFSL Number - 230323.**

Could you please ensure that all servicing rights are transferred to my new adviser. Also please have noted that I give permission to all staff at Consultum Financial Advisers Pty Ltd to have access to information on the above account/policy so that advice is able to be given to me in a fully informed manner.

Please bring this authority into effect and update your records accordingly, should you wish to contact him, he is available on;

Post: PO Box 9007
Harris Park NSW 2150
Phone: 02 8843 8999
Fax: 02 8843 8988

Yours Sincerely,

Signature: _____

Signature: _____

Name: _____

Name: _____

D.O.B: _____

D.O.B: _____

Address: _____

Address: _____
