

RI FINANCIAL MANAGEMENT SERVICES (PTY) LTD

LETTER OF AUTHORITY AND OR APPOINTMENT



Client information

Full Names _____	Surname _____
Known as _____	Maiden Name _____
ID Number _____	
Passport Number _____	Date of Birth _____
<u>Contact Details</u>	
Work _____	Home _____
E-mail _____	Cell phone _____
Postal Address _____	Physical Address _____
_____	_____
_____	_____
On behalf of	
Company Name _____	Company Reg Number _____
Trust or Estate _____	Number _____

I acknowledge the following:

Sound and proper financial advice can only be provided with full disclosure of relevant information for the purpose of determining and advising on my financial situation and financial product experience and objectives.

RI Financial Management Services has a service agreement with Smit & Kie Brokers (PTY) Ltd, an authorised financial services provider. The service agreement is for Short-Term Insurance administration purposes.

I accordingly confirm, for the purposes of providing the said sound and proper financial advice to me that full permission and authority is granted to:

RI Financial Management Services (PTY) Ltd (FSP 47004)	PTN 2 Farm Spokie, Hartbeesfontein, Hekpoort
Key Individual Ilse de Klerk	0823424848 ilse@rifin.co.za
Representative Ilse de Klerk	Supporting Employees Linda Mitchley linda@rifin.co.za
	Arnold Tomlinson admin@rifin.co.za

I herewith give consent for all relevant financial institution with whom I do have a policy, investment or account to release my information to above mentioned. My information would be used to enable RI Financial Management Services to provide advice and related services to me.

RI Financial Management Services (PTY) Ltd and staff, acknowledge that in the course of rendering services in terms of this authority, they shall come into possession of information of a confidential nature. No staff shall at any time use or disclose or allow third parties to use or disclose any of my confidential information except with your written permission.

I also confirm that I have been given the Introduction and Disclosure letter of RI Financial Management Services (PTY) Ltd.

Companies where my policies and or investments are held:

Signature for Authorisation _____

Authorisation will only be for a period of 6 months after signature date.

For the purpose of signing for **Appointing RI Financial Management Services (PTY) Ltd and Ilse de Klerk** as my advisor I am requesting that all future fees would be re-directed to above mentioned.

I agree that on all my investments that a ongoing advice fee must be paid. Alternatively note the re-direction of fees documentation for each provider.

Signature for Appointment and/or re-direction of fees _____

Date of Signature _____