



SCENIC RIM
FINANCIAL PLANNING

AUTHORISATION TO COLLECT INFORMATION / TRANSFER OF SERVICING RIGHTS

Please accept this copy, as the original will stay on file at the below address.

Product provider's name	Product name/Cover type	Member number (if known)
	SUPER, INSURANCE	
	INVESTMENT	

Client Name		Date of Birth	
Address	Current Address: Previous Address your Super Fund has on file: Email:		

To Whom It May Concern

Access to information

- ☒ I authorise you to provide representatives of Scenic Rim Financial Planning Pty Ltd (Sarah Nulty, Robert Lawrence, Nina Lawrence, Jen Petrovic and Christie Gooden) with any information and documentation they require regarding my insurance, superannuation, investments or other financial products.
- ☒ I am aware of the provisions of the Privacy Act and release you from those provisions in respect of information provided to Sarah Nulty and representatives above.
- ☒ This authority is to remain in force until revoked by me in writing.

Notice to Platform Management (including Trustee)

- ☒ Please ensure all future correspondence directed to us by Management is shared with our trusted Adviser.
- ☒ We also give written permission to Platform Management that our Adviser should always have access to our information until we otherwise inform you.

Transfer of Servicing Rights

- ☐ I authorise the servicing rights of my financial products be transferred to Sarah Nulty AR #442864 of Scenic Rim Financial Planning Pty Ltd ABN 18 112 135 350, ACN: 112 135 350.

I understand that the existing adviser will no longer:

- be remunerated for this policy/contract(s) following this decision
- have access to my policy/contract information, and
- will no longer be responsible for reviewing my ongoing needs

I understand that the appointed adviser and their Licensee:

- will have access to my policy/contract information
- will be responsible for providing me with ongoing advice relating to this policy/contract(s), and
- will receive any remuneration currently being paid for this policy following the transfer.

Update Address

- ☒ Please update the address on file to my current address listed above.

CLIENT WET SIGNATURE and DATE:	ADVISER SIGNATURE and DATE:

Adviser Name	Sarah Nulty	AFSL	Athena Financial Services #569 806 ABN: 15 686 060 588
AR #	442864	Adviser Code/s	
Business	Scenic Rim Financial Planning Pty Ltd	Contact Details	Phone: (07) 5613 1920
Address	2/119 Brisbane St, Beaudesert QLD 4285 PO Box 288, Canungra QLD 4275		Email: sarah@scenicrimfp.com.au info@scenicrimfp.com.au