FEDGROUP

FINANCIAL PLANNER INFORMATION PAGE

1. OFFICE USE ONLY

FG number

F G

Consultant

2. IMPORTANT NOTES

1.FedGroup comprises of the following entities:

1.1 FedGroup Participation Bond Managers Pty Ltd
1.2 FedGroup Life Limited Ltd
1.3 FedGroup Trust Administrators Pty Ltd
1.4 FedGroup Fund Administrators Pty Ltd
1.5 FedGroup Asset Management Pty Ltd
1.6 FedGroup Employee Benefits Pty Ltd
1.7 FedGroup Financial Services Pty Ltd

2. "Brokerage" refers to the entity that has been registered as FSP in terms of FAIS (company, firm, etc)
3. "Financial Planner" refers to a broker giving advice

3. ATTACH THE FOLLOWING DOCUMENTS

Copy of Identity Document ☐ Proof of residence ☐ RE5 certificate ☐

4. BROKERAGE DETAILS

Brokerage name

FSP no.

5. PARTICULARS OF BROKERAGE

Title Surname

Full name(s)

ID no

Date of birth D D M M Y Y Y Y

Gender M F

Physical address

Code

Postal address

Code

FEDGROUP / APPLICATION FOR A BROKERAGE CONTRACT / FED0019

FEDGROUP

5. PARTICULARS OF BROKERAGE (CONTINUED)

Email

Tel no

Cell no

Interests (tick appropriate block)

Golf		Soccer		Mountain Biking		Red wine		Brandy/Cognac	
Rugby		Cooking		Road Cycling		White wine		Whiskey	
Cricket		Theatre		Outdoors		Other:			

Signature

Date

D D M M Y Y Y Y

FEDGROUP / APPLICATION FOR A BROKERAGE CONTRACT / FED0019