***Request Form:***

***RoA, Associate, Administration, Compliance & Consulting***

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| Adviser Details |
| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | Practice Name |  | Adviser Name | | |  | | Contact Person |  | Email  Phone |  | | | | AR Number |  | CAR Number | |  | | | Licensee |  | | | | | |

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| Client Details |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Client Name |  | | | | | | | Last SOA date: | |  |  | | |  | | Version FSG Provided | |  | | Advice to | Client Only  Spouse Only  Joint  Other: | | |

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| Services Required |
| |  |  |  | | --- | --- | --- | | Admin  Admin/Client Services  Associate Adviser  Paraplanning  Modelling / Projections  Other | ROA  TTR Refresh/Recast  Super Salary Sacrifice  No change/Hold  Centrelink update  Switch  Platform change | Other  Centrelink application  First Year  Second Year  Couple  Single  HCC  Review  Additional  Aged Care Application | |

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| Disclosure of Fees |
| Details renumeration and where the money will be debited from i.e. Super Fund/Bank Account Details   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Type of Fee** | | **Amount** | | **How will fees be split? (i.e. 50% client, 50% partner)** | | | SoA Fee | |  | |  | | | Implementation Fee | |  | |  | | | Ongoing Adviser Fee | |  | |  | | | Upfront Commission | |  | | Upfront/Hybrid/Level | | | Renewal Commission | |  | |  | | | Any other fees: | | | | | | | **Specialist Referrals** | | | | | | | Accountancy | Estate Planning / Legal | | Finance | | Insurance | | *Referral Party:*  Clients do not require a referral to an accountant | *Referral Party:*  Clients do not require a referral to a solicitor | | *Referral Party:*  Clients do not require a referral to a Finance Broker because I am their Finance Broker | | *Referral Party:*  Clients do not require a referral to a General Insurance Broker. | |