***Request Form:***

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

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

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

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| Services Required |
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| --- | --- | --- |
| 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. |

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