

Perpetual Private

# Lifestyle Assist

## Financial Services Guide

### About this document

This Financial Services Guide (FSG) is an important document that provides you with information about Perpetual Trustee Company Limited (PTCo) and our Lifestyle Assist services (Lifestyle Assist). PTCo is authorised to provide Lifestyle Assist under its Australian Financial Services Licence 236643 (AFSL).

This FSG will help you to understand Lifestyle Assist and determine whether or not you should use it. It includes details about:

- who we are
- how Lifestyle Assist works
- fees and expenses for Lifestyle Assist
- how our Lifestyle Assist dedicated contacts (and our associates) are remunerated
- providing instructions to us
- our procedure for handling complaints
- how you can contact us.

The information contained in this FSG is general information only and has been prepared without taking into account any particular individual's investment objectives, financial situation or needs.

The Agreement, which includes the terms and conditions for Lifestyle Assist, is also included in this document.

### About us

PTCo (also referred to as 'we', 'us' and 'our' in this FSG) is a wholly owned subsidiary of Perpetual Limited ABN 86 000 431 827 and part of the Perpetual Group, which is one of Australia's most experienced investment and trustee groups.

Founded in 1886, the Perpetual Group has helped generations of Australians invest and manage their wealth through all market conditions.

We act for ourselves in providing Lifestyle Assist services to you. We do not act as a representative of any other licensee in relation to the services we provide you.

### Lifestyle Assist

The financial services provided under this FSG for Lifestyle Assist may include:

- an ancillary range of financial services and other non-financial personal concierge support services to help you manage your life and maintain your independence (see 'Lifestyle Assist general services' for further information)
- traditional trustee services limited to acting on your behalf under power of attorney for the implementation of financial management and legal decisions if you lose capacity (see 'Power of attorney' for further information).

Lifestyle Assist includes day-to-day management or coordination of:

- financial and asset management
- bill payments
- personal care and administration
- legal, tax and insurance matters
- transition to residential care.

You will have a dedicated contact assigned to provide you with agreed Lifestyle Assist services.

**FINANCIAL SERVICES GUIDE DATED 26 NOVEMBER 2021**

Issued by Perpetual Trustee Company Limited  
ABN 42 000 001 007 AFSL 236643



## Lifestyle Assist general services

Lifestyle Assist offers two levels of general services – Essentials and Core. Depending on which level you choose, your dedicated contact will assist you, during business hours, with the following services as agreed from time to time.

Lifestyle Assist general services	Essentials	Core
Providing assistance with coordinating your financial matters, including: <ul style="list-style-type: none"> <li>• opening and closing banking facilities</li> <li>• participation in corporate actions</li> <li>• managing the receipt of any dividends and interest payments on your investments</li> <li>• issue identification and resolution arising from financial communications sent to you</li> </ul>	•	•
Managing bill payments, including utility bills, home maintenance bills and/or other regular and ad hoc payments as agreed from time to time	•	•
Coordinating access to other specialist services <sup>1</sup>	•	•
Meeting with you periodically to understand your needs	•	•
Providing you with personal access to Perpetual by telephone, email, in person or electronically	•	•
Establishing or renewing any required essential services and utilities		•
Establishing or renewing insurance policies and providing assistance with processing insurance claims		•
Liaising with your accountant and coordinate the completion of your tax returns		•
Arranging for payment of tax instalments, superannuation contributions and capital gains tax, as required		•
Providing assistance with establishing, renewing and paying health insurance and processing medical and dental claims		•
Arranging for selected personal services, such as a cleaner or a carer		•
Arranging for registration of your motor vehicle and a regular maintenance schedule		•
Liaising with a travel agent to meet your travel needs		•
Providing support for any required Centrelink/Department of Veterans' Affairs administration		•
Providing other services to you, including general support, as agreed from time to time		•

1 See 'Other specialist services' for further information.

## Transition to residential care

The need for residential care can be sudden and often overwhelming. Your dedicated contact can assist in supporting you by facilitating the transition process, alleviating stress and burden.

For an additional fee, your dedicated contact can also help you transition to a different living arrangement, which includes:

- liaising with you, your family or a specialist (as appropriate) to help you find and secure the most suitable care facility accommodation
- coordinating the legal review of a nursing home contract
- coordinating the completion of any other required documents
- negotiating accommodation payments
- liaising with your financial advisor to ensure that adequate funds are raised to pay for the Refundable Accommodation Deposit
- assisting with your move by arranging for any removalist, valuer and/or decluttering.

## Our discretions

We may appoint any related party or agent of the Perpetual Group, or any third party, to provide Lifestyle Assist services to you.

At our discretion, we may take no action in situations where you cannot be contacted and/or we determine that we do not have an authority from you to act.

## Power of Attorney

To facilitate Lifestyle Assist, we will require you to appoint us as your attorney via either:

- an Enduring Power of Attorney with an immediate effect clause or
- a General Power of Attorney (if we agree at our discretion).

The terms of the Power of Attorney must:

- be broad enough to cover the Lifestyle Assist services that we have agreed to provide to you
- appoint us as your sole attorney, unless we otherwise agree at our discretion.

If you appoint us as your financial manager via an Enduring Power of Attorney, in the event that you lose capacity, you can be assured that your financial affairs will be taken care of as we will act in your best interest and endeavour to preserve your lifestyle. The relevant fees and charges that apply to our Health and Personal Injury administration services, as detailed in the separate financial services guide for our Traditional Trustee Company Services, will apply.

## Fees and expenses for Lifestyle Assist services

All fees and any expenses incurred in providing Lifestyle Assist services to you are paid by deduction from your cash account within Perpetual Private Investment Wrap (Wrap).

Unless otherwise stated, the following standard fees are inclusive of the net effect of goods and services tax (GST), if applicable. You may be able to negotiate these fees with your dedicated contact.

Details of the fees and costs for the Lifestyle Assist services you have chosen in the Agreement will be confirmed to you separately in writing.

We will provide 30 days' notice if our fees change.

### Fees for Lifestyle Assist general services

Service level	Annual fee	Minimum fee
Essentials	\$3,000 pa	\$3,000 pa
Core	0.30% of the total value of your portfolio held in one or more Perpetual Private Wrap product(s) and/or service(s)	\$6,000 pa

Fees for Lifestyle Assist general services are charged monthly.

Under the Lifestyle Assist Agreement, if two people act jointly to obtain Lifestyle Assist services, they will be considered to have a single joint account for fee charging purposes.

### Fee for Lifestyle Assist transition to residential care

A flat fee of \$3,500 applies for the additional transition to residential care services, which is payable after the placement is made.

### Fees for additional administrative tasks and short-term engagements

Additional administrative tasks that you request your dedicated contact to perform may incur additional costs.

Your dedicated contact will provide you an estimation of the cost prior to the commencement of the work and will advise you when the actual cost is likely to exceed the estimated amount before proceeding further.

If you wish to engage the Lifestyle Assist service for a short period of less than one year, we will provide a specific pricing quote that reflects the scale and scope of the arrangement.

### Expense recovery

#### Professional expenses payable

If we engage any other service provider on your behalf, including a related Perpetual Group entity, they may be paid fees, commission or brokerage (including GST). These may be in addition to any other fees that are payable to us. Services may include:

- real estate or business agent
- property management services
- trustee or manager of a common fund or unit trust
- asset investment management
- legal counsel
- registered tax agent.

#### Other expenses

We are entitled to reimbursement of all properly incurred expenses in the provision of services to you. These expenses include but are not limited to postage, couriers, photocopying, bank charges, telecommunication charges, settlement fees and certain payments to third parties.

#### Offset expenses

Any cash balance held by us in your Wrap account is invested in the Perpetual Cash Account established for clients and held with Macquarie Bank Limited (ABN 46 008 583 542, AFSL 237502). We retain a margin of up to 1.5% per annum of the interest earned on the Perpetual Cash Account to offset operational costs.

## Perpetual Private Investment Wrap

To receive Lifestyle Assist, you will need to be a client of the Wrap. This is because the following amounts are paid from your cash account within the Wrap:

- any payments made on your behalf by us when providing Lifestyle Assist
- all fees and expenses payable to us for Lifestyle Assist.

The terms and conditions governing your investments in the Wrap, including fees and costs, are set out in its separate IDPS Guide and Financial Services Guide. Fees and charges payable for the Wrap are an additional cost to you.

To receive Lifestyle Assist, you must also elect to receive either a financial advice or custody service via the Wrap. Details about these services are contained in the separate financial services guide for our financial advice and custody services, which will also be provided to you.

## Remuneration received

### Lifestyle Assist dedicated contact remuneration

All of our Lifestyle Assist dedicated contacts are salaried employees of the Perpetual Group.

If an employee meets or exceeds key performance targets, they may receive an annual bonus. All employees may also receive an annual allocation of shares (or, in some instances, performance rights) in Perpetual Limited based upon the overall performance of Perpetual Limited.

### Perpetual Group remuneration

Any remuneration received by the Perpetual Group entities for products and services provided will be detailed in the product disclosure statement, financial services guide or other relevant disclosure document you will receive for the relevant product or service.

## Additional information

### Other specialist services

**Your Lifestyle Assist dedicated contact is not a financial advisor and cannot provide you with any form of financial advice.**

Your dedicated contact can arrange access to general advice or the following specialist services if you request them:

- personal financial advice
- property services
- tax planning, advice, return preparation and accounting services
- life insurance advice
- trust and estate management
- Health and Personal Injury administration services
- estate planning, including general estate planning advice and establishment of trusts.

These services may be provided to you by a Perpetual Group entity or a referral partner and are an additional cost to you. Any terms and conditions applicable to these services will be provided to you at the time of receipt of the service.

Where personal advice is provided, you will receive a separate financial services guide and Statement of Advice (SoA) providing further information, including details of relevant fees and charges.

Where a trust or estate management service is provided, you will receive a separate financial services guide providing further information about our Traditional Trustee Company Services, including details of relevant fees and charges.

From time to time, we may engage your professional providers to assist us in providing services to you. If this is the case, we will be invoiced separately in an itemised format and the costs will be borne by us.

### Providing instructions to us

We may accept verbal or written instructions from you in our sole discretion. We will advise you when a written instruction is required.

Where applicable, we will generally accept instructions from one joint client only.

### Personal information

We collect personal information from you to be able to provide Lifestyle Assist services to you and comply with any relevant laws. If you do not provide us with your relevant personal information, we will not be able to do so. In some circumstances we may disclose your personal information to Perpetual Limited's related entities or service providers that perform a range of services on our behalf and which may be located overseas.

Privacy laws apply to our handling of personal information and we will collect, use and disclose your personal information in accordance with our privacy policy, which includes details about the following matters:

- the kinds of personal information we collect and hold
- how we collect and hold personal information
- the purposes for which we collect, hold, use and disclose personal information
- the types of entities we usually disclose personal information to and the countries where they are likely to be located if it is practicable for us to specify those countries
- how you may access personal information that we hold about you and seek correction of such information (note that exceptions apply in some circumstances)
- how you may complain about a breach of the Australian Privacy Principles (APP), or a registered APP code (if any) that binds us, and how we will deal with such a complaint.

Our privacy policy is publicly available at our website or you can obtain a copy free of charge by contacting us.

### Conflicts of interest

As we are part of the Perpetual Group, which is a diversified financial services organisation that participates in both the domestic and international markets, both real and perceived conflicts of interest may arise when providing Lifestyle Assist services. We have policies as to how we manage conflicts of interest and these policies apply to Lifestyle Assist.

## Professional indemnity insurance

Perpetual Limited holds a professional indemnity insurance policy, which satisfies the requirements for compensation arrangements under section 912B of the Corporations Act. Subject to its terms and conditions, the policy provides cover for civil liability resulting from third party claims concerning the professional services provided by Perpetual Limited, its subsidiaries and its employees and representatives. This policy covers professional services provided by employees and representatives of Perpetual Limited and its subsidiaries while they are in our employ, even where that employee or representative has subsequently left our employ.

## Complaints

If you have a complaint about the financial services provided, you should take one of the following steps:

1. Contact your Lifestyle Assist dedicated contact and tell them about your complaint.
2. Email your complaint to [MyComplaint@perpetual.com.au](mailto:MyComplaint@perpetual.com.au).
3. Complete our online complaints submission form available at [www.perpetual.com.au/privacy-policy/making-a-complaint](http://www.perpetual.com.au/privacy-policy/making-a-complaint).
4. Put your complaint in writing and mail it to:  
Perpetual Private – Complaints  
Lifestyle Assist  
GPO Box 4172  
Sydney NSW 2001

We will endeavour to respond to your complaint fairly and as quickly as we can and by no later than the maximum response timeframe of 30 days (or 45 days for traditional trustee services). If we have not had a reasonable opportunity to respond to your complaint before the relevant maximum response timeframe ends, we will write to you to let you know.

If, before the maximum response timeframe for your complaint has passed, you don't feel as though your concerns are being heard or have received our response and are not satisfied with the resolution that has been proposed, our Client Advocacy Team may be able to assist you. Please see [www.perpetual.com.au/about/client-advocacy](http://www.perpetual.com.au/about/client-advocacy) for information on how to get in touch with our Client Advocacy Team members.

If, at any time you are not satisfied with our response to your complaint, any aspect of our complaints handling process or if you have not received a response within the maximum response timeframe, the Australian Financial Complaints Authority (AFCA) might be able to assist you.

## Australian Financial Complaints Authority

We are members of the AFCA external dispute resolution scheme.

AFCA has been established by the Commonwealth Government to deal with complaints from consumers and small businesses about financial services firms. AFCA service is free of charge to you.

Contact details for AFCA are as follows:

Phone: 1800 931 678

Email: [info@afca.org.au](mailto:info@afca.org.au)

Website: [www.afca.org.au](http://www.afca.org.au)

Mail: Australian Financial Complaints Authority  
GPO Box 3, Melbourne VIC 3001

## Contact details

### Website

[www.perpetual.com.au](http://www.perpetual.com.au)

### Email

[perpetualprivate@perpetual.com.au](mailto:perpetualprivate@perpetual.com.au)

### Phone

During business hours (Sydney time)  
1800 631 381

### Postal address

GPO Box 4172  
Sydney NSW 2001

### Perpetual Group state offices

#### Australian Capital Territory

Nishi Building  
Level 9, 2 Phillip Law Street  
Canberra ACT 2601

#### New South Wales (also registered company office)

Angel Place  
Level 18, 123 Pitt Street  
Sydney NSW 2000

#### Queensland

Central Plaza 1  
Level 15, 345 Queen Street  
Brisbane QLD 4000

#### South Australia

Level 11  
101 Grenfell Street  
Adelaide SA 5000

#### Victoria

Rialto South Tower  
Level 29, 525 Collins Street  
Melbourne VIC 3000

#### Western Australia

Exchange Tower  
Level 29, 2 The Esplanade  
Perth WA 6000

# Financial Services Guide acknowledgement

I/We .....

acknowledge that I/we have received the Financial Services Guide dated 26 November 2021 for Perpetual Private Lifestyle Assist issued by Perpetual Trustee Company Limited.

Signed: ..... Date: ..... / ..... / .....

Signed: ..... Date: ..... / ..... / .....



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# Lifestyle Assist Agreement

## Terms and conditions

You (being each person who completes the Declaration section of this Agreement) appoint us to provide you with Lifestyle Assist based on the terms of this Agreement. We accept this appointment.

Terms used in this Agreement have the same meaning as in the FSG, unless stated otherwise.

## Your obligations and acknowledgements

You acknowledge and agree to the following terms and conditions under which we will provide you with Lifestyle Assist:

- we will at all times provide Lifestyle Assist to you honestly and with due care and skill
- you agree to become a client of Perpetual Private Investment Wrap (if you are not already a client) to facilitate the provision of Lifestyle Assist and acknowledge that the fees and charges payable for your Investment Wrap account are an additional cost to you
- you agree to become a client of one of the Perpetual Private financial advice or custody services (if you are not already a client) and acknowledge that the fees and charges payable for the relevant service are an additional cost to you
- you agree to appoint PTCO as an attorney and the terms of the power of the attorney are to be in a form approved by us
- we reserve the right to decline to provide any service or act on your behalf or on your instruction at any time at our discretion, including but not limited to where:
  - you do not have sufficient cleared funds (cash) in your cash account within the Perpetual Private Investment Wrap (your Perpetual Cash Account), or your other agreed account, to cover the full value, fees, costs or out-of-pocket expenses associated with performing any service or executing any instruction or any fees payable to us for the Lifestyle Assist service
  - to carry out your instructions would, in our opinion, cause any breach in applicable law, regulation, practice, constitution, regulatory or other policy or the terms of our AFSL or give rise to conflict of any interest (including conflict of interest between us and any associated entity within the Perpetual Group)
  - we reasonably believe that to do so would be adverse to your or our interests
- at our discretion, we may only agree to act upon receipt of a written instruction and/or any required documentation from you, and we will advise you where this is the case
- we will notify you as soon as practicable of any difficulty we are experiencing in relation to providing or implementing any Lifestyle Assist service, or implementing any instruction on your behalf

- if you authorise us to make bill payments as one of Lifestyle Assist services to you, you acknowledge that you remain liable for bills that we pay on your behalf. If there are insufficient funds available in your Perpetual Cash Account or other agreed account, we will notify you as soon as practicable after this becomes apparent. You acknowledge that you may be liable to pay penalties or interest on any outstanding bill amounts incurred by you due to your failure to maintain an adequate balance in your Perpetual Cash Account or other agreed account. You also acknowledge that you will be liable to pay any penalties or interest incurred on any outstanding amount
- this Agreement for us to provide you with Lifestyle Assist will commence, and fees will be payable, on and from the date that it is signed by you and will continue until terminated in accordance with terms of this Agreement.

## Fees and expenses

Fees for Lifestyle Assist are as set out in the FSG and will depend on the level of service you agree to obtain from us in this Agreement. The fees for these services will be confirmed to you separately in writing.

Fees for Lifestyle Assist do not include the following:

- fees and costs for the Perpetual Private Investment Wrap
- fees and costs for any of the Perpetual Private financial advice or custody services
- expense recovery for implementing your instructions and Lifestyle Assist
- any complex or usual work that we perform for you (the scope and cost of which will be agreed with you prior to commencing any such work)
- other specialist services as set out in the FSG
- fees for additional administrative tasks.

These are an additional cost to you.

## Nature and scope of our discretions and associated risks

We may exercise full discretion under the Power of Attorney you provide to us to execute and perform Lifestyle Assist, including by carrying out Lifestyle Assist in the manner and on the terms and in the timeframes we determine.

Where we accept an instruction from you (in the approved form) to provide Lifestyle Assist, we will continue to provide that service until you notify us that it is no longer required.

You must notify us immediately if your circumstances change. Any delay in doing so may affect the appropriateness of Lifestyle Assist provided to you.

We will contact you where an action is required by you to implement or finalise a Lifestyle Assist service. If you cannot be contacted, we will not act.

## Joint accounts and authorised signatories

Where the Agreement relates to two people acting jointly as the Client, we may accept instructions jointly or from either person severally. Each person is jointly and severally responsible for all matters under the Agreement.

Each person may appoint an Authorised Signatory by completing the authorisation provided in this document.

We may assume the authenticity of any communication received from you or your Authorised Signatory(ies) and that any person claiming to be your Authorised Signatory(ies) is in fact that person.

You must notify us in writing if you wish to remove or change your Authorised Signatory(ies).

## Changes to services

We may implement changes to the Agreement and to any Lifestyle Assist services provided under the Agreement at our complete discretion. Where a change is material, we will provide you written notice of any such change within a reasonable time in the circumstances.

## Termination of agreement

### **Whilst you have capacity**

Whilst you have capacity, we may terminate the Agreement at any time with 30 days' notice to you.

In this event, we will resign as your Attorney and provide you with written notice of the retirement. We will then no longer be your Attorney and it will be incumbent on you to appoint someone else to act as your attorney, if required.

### **If you lose capacity**

The Agreement will terminate immediately upon our receipt of notification from your treating medical practitioner that you have lost capacity.

If you have appointed us as an attorney under an Enduring Power of Attorney, we will continue to look after your affairs after you have lost capacity via our Health and Personal Injury administration services. The relevant fees for those services, applicable at the time that you lose capacity, will apply.

When we consider that it is not in your best financial interests to continue with our Health and Personal Injury administration services, we will apply to the relevant Tribunal for the appointment of a new financial manager to act on your behalf.

## **Governing law**

The Agreement will be governed by the laws applicable in the state of New South Wales. You and PTCO each submit to the non-exclusive jurisdiction of courts exercising jurisdiction in that State.

# Perpetual Private Lifestyle Assist – Declaration

By signing this Agreement, I/we (being the person(s) choosing to obtain Lifestyle Assist) declare and agree that:

- I/we have read and understood the Financial Services Guide dated 26 November 2021 for Perpetual Private Lifestyle Assist (FSG) issued by Perpetual Trustee Company Limited (PTCo)
- I/we request PTCo to provide me/us with the Lifestyle Assist services as specified below and described in the Agreement and FSG (or otherwise by written agreement with PTCo from time to time), including to set up all accounts required to do so
- I/we have read and agree to be bound by the terms of this Agreement and Lifestyle Assist as set out in the Agreement and FSG, including payment of fees and expenses for any Lifestyle Assist services I/we request from time to time
- I/we provide PTCo with a standing instruction to facilitate the payment for any service requested by me/us under this Agreement from my/our cash account within Perpetual Private Investment Wrap or other agreed account
- where I/we have signed this Agreement as a joint client, I/we each agree to be bound both jointly and severally
- I/we authorise PTCo to change my/our contact details with all relevant parties to PTCo, including to be named as the contact person for my/our bank(s), accountant, utilities provider(s) and IT/telecommunications provider(s), as applicable
- I/we will not rely on any communication (written or oral) from my/our Lifestyle Assist dedicated contact as general or personal financial advice or as a recommendation to invest in any product or enter into any transaction
- PTCo will not be liable to me/us or any third party for any delay in implementing an instruction or a Lifestyle Assist service, or for any decision not to implement an instruction or provide a Lifestyle Assist service, for any direct, indirect or consequential loss, cost, expense or liability when providing Lifestyle Assist services under this Agreement
- to the fullest extent permitted by law, I/we indemnify PTCo for any action that is taken, or is omitted to be taken, by PTCo in performing the Lifestyle Assist services and from all claims, expenses, demands, damages, losses and liabilities incurred under or relating to this Agreement except to the extent that any loss, expense, cost or liability results from PTCo’s fraud or wilful breach of this Agreement
- I/we represent to PTCo that I/we have the legal power and authority to enter into this Agreement and that my/our obligations under this Agreement are legal, valid and binding, and enforceable against me/us. I/We also agree to inform PTCo immediately of any event or change in circumstances that might affect my/our continuing authority or power to perform any obligations covered under this Agreement
- I/we have read and understood Perpetual’s privacy policy and authorise PTCo to use information provided by me/us to another Perpetual Group company for the purposes of providing Lifestyle Assist to me/us.

## Lifestyle Assist services and agreed fees

I/We request PTCo to provide me/us with the following Lifestyle Assist services: (please  the relevant box/es)

<input type="checkbox"/> General – Essentials	or	<input type="checkbox"/> General – Core	\$	or	% pa (min \$ )
<input type="checkbox"/> Transition to residential care			\$		
<input type="checkbox"/> Additional requested administrative tasks			\$		(estimated)

### Client A

Signature		Date	
Name			
Address			
Phone (H)	Phone (W)	Phone (M)	
Email			

### Client B

Signature		Date	
Name			
Address (if different to Client A)			
Phone (H)	Phone (W)	Phone (M)	
Email			

### The above Declaration and Agreement was signed in the presence of:

Witness signature		Date	
Witness name			
Witness address			

# Perpetual Private Lifestyle Assist – Authorised signatories

The following authorised signatory/signatories can give instructions to PTCO on my/our behalf for the purposes of my/our Agreement relating to Perpetual Private Lifestyle Assist.

Any authorised signatory needs to be identified in accordance with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 and the information provided is subject to the requirements of the Privacy Act 1988.

By completing this section, your authorised signatory consents to PTCO collecting, holding and using their personal information for the purposes of providing services to you under the Lifestyle Assist Agreement.

Please note that the powers of the authorised signatory/signatories below are limited to the services provided under the Lifestyle Assist Agreement. They do not replace, supersede or extend to third party access arrangements specific to visibility of, or access to, Perpetual Private Investment Wrap accounts or other portfolio administration services.

Third party access to Perpetual Private Investment Wrap accounts must be arranged separately using the relevant request and authorisation forms ('Perpetual Private Wrap Third Party Authority', 'Perpetual Private Wrap Third Party Online Access Registration Form', 'Perpetual Private Wrap Third Party Online Access Authorisation Form').

Authorised signatory 1			
<i>(strike through page if not applicable)</i>			
Signature			Date
Name			
Address			
Phone (H)	Phone (W)	Phone (M)	
Email			
Relationship to client(s)			
Authorised signatory 2			
<i>(strike through page if not applicable)</i>			
Signature			Date
Name			
Address			
Phone (H)	Phone (W)	Phone (M)	
Email			
Relationship to client(s)			
Client signatures			
Client A			
Client B			
Date			