

I, _____

of _____

- have read, understood and retained a copy of the Financial Services Guide Supplied by _____ (Adviser) of **AXIS Financial Group**.
- understand that _____ (Adviser) is an Authorised Representative of AXIS Financial Group Pty Ltd (ABN 21 092 889 579), Australian Financial Services Licence Holder 233680.
- am aware that the Statement of Advice (SOA) will be prepared from the Investment Planning Questionnaire that I completed as a member of the _____ (Previous Employer) Superannuation Plan, as well as subsequent information gathered by **AXIS Financial Group** while I have been a client.
- Agree that my risk profile in regards to my superannuation investment, as previously identified from the completed Investment Planning Questionnaire has not changed and this has been discussed with _____ (Adviser).
- am aware that the Statement of Advice will only address the transfer of my existing superannuation fund managed by AXIS Financial Group to a new superannuation fund and an appropriate investment portfolio in line with my tolerance to risk within the new fund.
- understand that there will not be a Fee for the preparation of this Statement of Advice.
- understand that the contents of the Statement of Advice will be for my sole use and subsequent copying and distribution is not permitted.

I hereby authorise _____ (Adviser) of **AXIS FINANCIAL GROUP** to proceed with the preparation of the Estimate on **my** behalf.

Signature Client

___/___/___
Date

This Authority to Proceed is accepted by

Adviser

on behalf of **AXIS FINANCIAL GROUP** on

___/___/___
Date

Disclaimer

All due care and diligence has been taken and will be taken by AXIS Financial Group in the preparation of your Statement of Advice. AXIS FINANCIAL GROUP accepts no responsibility for any errors or omissions made by the client when giving details regarding this Statement of Advice. Information contained in the Statement of Advice will be based upon the information supplied by the client.