

Authority to proceed (Full Plan)

We hereby authorise ADVISER NAME, Authorised Representative of Integrity Financial Planners Pty Ltd, to arrange for the implementation of the recommendations specified in the Statement of Advice dated XX/XX/XXXX.

We have read the Statement of Advice, agree that the client information on which it is based is complete and accurate and accept the advice provided.

We acknowledge that every care has been taken to ensure the accuracy of information included in this document and that neither Integrity Financial Planners nor its representative will accept responsibility for any errors or omissions made by us regarding the information we have provided.

We understand that no guarantee is given that investments will meet the expectations stated in this report and that adverse market conditions may result in a reduction in the capital value of our investments.

We understand that:

- We will be charged \$550.00 for the preparation of this Statement of Advice;
- On the implementation of any new investments, a fee of 1.10% (inc GST) will be deducted by the investment manager and paid to Integrity Financial Planners;
- We will be charged a fee for ongoing services which will not currently exceed 1.10% per year (inc GST) of the value of our portfolio.

We have also been provided with a Financial Services Guide.

We authorise Integrity Financial Planners Pty Ltd to retain our tax file numbers whilst acting on our behalf and to quote our tax file numbers to the Australian Taxation Office and to investment companies when making investments on our behalf.*

I wish to advise that my tax file number is ____ ____ ____ **CLIENT NAME**

I wish to advise that my tax file number is ____ ____ ____ **PARTNER NAME**

*(*Please note, you do not have to provide your Tax File Number nor authorise its use. Please delete these paragraphs if you do not wish us to retain your TFN)*

Signed: _____ Date: ____/____/____
CLIENT NAME

Signed: _____ Date: ____/____/____
PARTNER NAME