**Referral for financial services**

You have asked us to refer you to a financial advisor for financial advice. The purpose of this document is to assist you with that referral and to ensure the referral complies with relevant laws. In particular, we can only make a referral to a financial advisor by telling you that the financial advisor, who must hold an Australian Financial Services Licence or be an authorised representative of a holder of an Australian Financial Services Licence is able to provide a particular financial service and giving you contact information for the financial advisor.

**Details of the accounting firm making the referral**

**Firm name:** Click here to enter text.

**Accountant:** Click here to enter text.

**Address:** Click here to enter text.

**State:** Choose an item. **Postcode:** Click here to enter text.

**Telephone:** Click here to enter text.

**Email:** Click here to enter text.

**Client details**

**Full name:** Click here to enter text.

**Telephone:** Click here to enter text.

**Email:** Click here to enter text.

**Details of the financial advisor**

**Firm / Company name:** Click here to enter text.

**Contact person:** Click here to enter text.

**Address:** Click here to enter text.

**State:** Choose an item. **Postcode:** Click here to enter text.

**Telephone:** Click here to enter text.

**Email:** Click here to enter text.

**Website:** Click here to enter text.

**Australian Financial Services Licence Number:** Click here to enter text.

**OR**

**Representative of Australian Financial Services Licensee:** Click here to enter text.

**AFSL Number:** Click here to enter text.

**Details/nature of the financial advice sought**

Click here to enter text.

**Disclaimer**

We make no representation regarding the quality, adequacy or appropriateness of the advice, or any other services, that may be provided to you. The financial advisor will be solely responsible for this. We recommend that you ask the financial advisor for a copy of the financial advisor's Financial Services Guide. You may be able to obtain this from the financial advisor's website. You should read the Financial Services Guide.

**Disclosure of benefits that we receive**

We are required by law to notify you of any benefit we or our associates receive for making the referral.

If you obtain financial advice from the financial advisor, the financial advisor will pay us a commission which is equal to, or is calculated as follows:

Click here to enter text.

The financial advisor may also from time to time provide us with information services, including articles, which may be attributable to the financial services provided to you.

##NOTE OR

We do not receive, or accept, any benefits from the financial advisor for any referral.

**Disclosure of information**

We will not provide any of your information to the financial advisor unless you agree for us to do this. If you agree for us to provide your information to the financial advisor for the purposes of assisting them to provide you with financial advice, we will only do so if the financial planner asks us for the information in writing.

We recommend that you obtain from the financial advisor a copy of its policy regarding the collection, retention, use and disclosure of personal information. This may be available on the financial advisor's website.

If you consent to us providing personal information to the financial advisor to assist with them providing financial advice, please indicate on the duplicate copy of this document.

I agree/do not agree to NAME OF FIRM providing my financial advisor named in this document with information, including personal information, when requested by the financial advisor in writing.

Name: Click here to enter text.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Acknowledgement**

I acknowledge that I have received of a copy of this document.

Name: Click here to enter text.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_