

FINANCIAL PLANNER INFORMATION PAGE

Brokerage Code <input type="text" value="B"/> <input type="text" value="I"/> <input type="text" value="D"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	OFFICE USE ONLY
Financial Planner Code <input type="text" value="F"/> <input type="text" value="I"/> <input type="text" value="N"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Consultant <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

- IMPORTANT NOTES:**
1. Complete a form for each additional financial planner
 2. FedGroup Financial Services comprises of the following entities:
 - 2.1 FedGroup Participation Bond Managers (Pty) Ltd
 - 2.2 FedGroup Life Limited
 - 2.3 FedGroup Trust Administrators (Pty) Ltd
 - 2.4 FedGroup Fund Administrators (Pty) Ltd
 - 2.5 FedGroup Asset Management (Pty) Ltd
 3. "Brokerage" refers to the entity that has been registered as a FSP in terms of FAIS (company/firm, etc.)
 4. "Financial planner" refers to a broker giving advice

ATTACH THE FOLLOWING DOCUMENTS:

Copy of Identity Document	
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BROKERAGE DETAILS:

Brokerage name	
Brokerage code	FSP no

FINANCIAL PLANNER'S DETAILS:

Title	Surname										
Full name(s)											
ID no	Date of birth	Gender									
	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>	<input type="text" value="M"/> <input type="text" value="F"/>									
Physical address						Postal address					
Code						Code					
Email											
Tel no						Cell no					
Interests (tick appropriate block)											
<input type="checkbox"/> Golf	<input type="checkbox"/> Soccer	<input type="checkbox"/> Mountain Biking	<input type="checkbox"/> Red wine	<input type="checkbox"/> Brandy/Cognac							
<input type="checkbox"/> Rugby	<input type="checkbox"/> Cooking	<input type="checkbox"/> Road Cycling	<input type="checkbox"/> White wine	<input type="checkbox"/> Whiskey							
<input type="checkbox"/> Cricket	<input type="checkbox"/> Theatre	<input type="checkbox"/> Outdoors	Other: <input type="text"/>								