

Client Nomination Form

Adrian Santos
Apogee Financial Planning
PO BOX 200, North Sydney
NSW 2060

Dear Adrian,

In response to the notification letter I received from Endeavour Private Wealth Pty Ltd advising me of their departure from Apogee, please be advised that I do not wish to move to Insurance AdviserNet and would like to remain with Apogee Financial Planning.

I understand this means my previous representative Jean-Paul Scamps will no longer provide me with financial planning advice.

Please arrange for an experienced adviser to contact me to discuss my financial situation and future needs.

I do not require an Adviser. Please cease my relationship with both Apogee Financial Planning & Endeavour Private Wealth Pty Ltd

I already have a new Financial Adviser. Please transfer all servicing rights to the following:

Adviser Name: _____
Adviser Code (If Known) : _____
Adviser Address: _____

Should you require to contact me, please do so on the following number:

My preferred contact Phone Number is: _____

Yours sincerely,

Name

D.O.B

Signature

Date Signed