

THIRD PARTY AUTHORITY

Client 1

Name:

Date of Birth:

Address:

Institution:

Policy Number:

Client 1

Name:

Date of Birth:

Address:

- We hereby give authority to Beresfords Financial Planning and its staff to access information regarding our account details. A member of Beresford Financial Planning staff will be contacting you shortly and I would appreciate it if you would supply them with any information that they require including copies of member statements.
- This authority is valid until revoked.
- Please note: THIS IS NOT A REQUEST TO CHANGE ADVISERS.

Contact details are as follows:

Financial Planners: James Beresford
Harry Bronn
Trudi Beresford

Staff: Erica Ibaviosa Alex Mercado
Nimfa De Los Santos Sam Carmiggelt
Katrina Reyes Efren Pabaya

Company: Beresfords Wealth Management
Licensee: Blicensed Pty Ltd
ABN: 34 153 990 660
AFSL: 318 930

Mailing Address: PO Box 2010
North Sydney NSW 2059

Email Address: paraplanner@beresfords.com.au
Phone: 02 9993 3900

Authorisation

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Name:

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For any queries regarding this request, please contact Katrina on (02) 9993 3916.



BERESFORDS
Wealth Management

02 9993 3900

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NSW 2060

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ACN : 153 990 660

