

Broker Nomination Form

It's Simple... Complete this form to register your policies with Fortitude. Available on all your financial products:

- Insurance Policies
- Cash Management Trusts
- Managed Funds
- Pensions & Annuities
- Superannuation
- Finance & Home Loans
- Master Trusts & Wraps
- Margin Loans
- Capital Protected & Structured Products and more...

Nominating Fortitude Financial Management Pty Ltd has no associated costs or penalties, and all control remains with you.

Please complete and return this form to:

FAX: 03 9583 0237 or **MAIL:** Unit 18, 328 Reserve Road CHELTENHAM, VIC 3192

Your Details

First name or company name		
Family name or director's name		
Address		
Suburb	State	Postcode
Contact phone	Date of birth	
E-mail address		

Details of Existing Policies and Accounts: *Use a separate form for each policy*

Fund Manager / Insurer Name: e.g. AXA		
Account name e.g. John Smith	Name of fund e.g. OnePath income protection	Client account / Policy number e.g. usually found on front page of statement

Signatures

I/We request that the fund manager / insurance company named above amend their records to indicate that Fortitude Financial Management Pty Ltd and the adviser listed below is the appointed broker / servicing agent for the investments / policies listed above. I/We understand that Fortitude Financial Management Pty Ltd will receive a trailing commission based on my / our investment amount / Policy. I/We have read the Fortitude Financial Management Pty Ltd Financial Services Guide and Adviser Profile.

Signature

Signature

Name (please print)

Name (please print)

Date

Date

Office Use Only

Adviser Name:

Adviser Number:

www.fortitudefm.com.au