

Letter of Authority

Date: _____

To: _____ Policy/Account/Ref Number(s): _____

Client Name: _____

Date of Birth: ____|____|____

Client Address: _____

Telephone Number: _____ Email: _____

Dear Sir/Madam

Please accept this letter as my authority to appoint Abacus Wealth Management Limited as my Financial Adviser/provide information only without appointing Abacus Wealth Management Limited as my Financial Adviser (* delete as appropriate) for the above plan(s).

In the event that you are unable to transfer the agency, please can you provide the information they request.

This letter of authority is to remain in place until cancelled by me/us.

If possible, please can you send the policy information by email to darren.mills@abacuswealth.gi

In responding to this letter, you confirm that the information provided has been stored and processed by you in full compliance with your obligations in respect of Regulation (EU) 2016/679 GDPR

We look forward to receiving your usual confirmation in due course.

Yours sincerely

Abacus Wealth Management Limited 5-9 Main Street, Gibraltar T: +350 200 42967

Email darren.mills@abacuswealth.gi

Directors: Darren Mills Robert Guest Christopher Pitaluga Joanne Rodriguez

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