*Guidance – delete before finalising:*

This form is designed to obtain consent from the client when their personal information is being provided to a 3rd party, such as a referral partner or another service provider. One release per entity.

Print on letterhead of the holder of information to ensure 3rd party has contact details.

Client to sign and date.

‘<<>>’ indicates text where you must choose between singular and plural or insert a name.

In order to assist us in obtaining additional services <<I/we>> give permission for <<my/our>> personal and financial information provided by <<me/us>> to <<name of current holder of client information>> to be forwarded to the following <<person/s and/or company/ies >>:

|  |  |
| --- | --- |
| **Information to be released:** | **Released to:** |
| Delete either entry or overwrite as necessary  Personal Information contained in the <<name document that contains information being released>>  OR  The following information:   * <<List specific information>> | <<name: Financial Planner, Mortgage Broker, Finance Provider, Solicitor, Accountant, Stockbroker etc.>> |

I have received and read the Privacy Policy of <<name of current holder of client information>>, and understand that my information cannot be provided to the above listed parties without my written consent.

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | | |
| Signed |
|  |  |  |  |
| <<Client name>> | | Date | **\_\_\_\_\_\_ / \_\_\_\_\_\_ / \_\_\_\_\_\_** |
|  |  | | |
|  |  | | |
|  |  | | |
| Signed |
|  |  |  |  |
| <<Client name>> | | Date | **\_\_\_\_\_\_ / \_\_\_\_\_\_ / \_\_\_\_\_\_** |
|  |  |  |  |
|  |  |  |  |
|  |  | | |
| Signed |
|  |  |  |  |
| <<name of current holder of client information>>, | | Date | **\_\_\_\_\_\_ / \_\_\_\_\_\_ / \_\_\_\_\_\_** |
|  |  |  |  |