



PO Box 745, Spring Hill, Qld 4004
12/220 Boundary Street, Brisbane Qld 4000



07 3368 2727



admin@humphreywealth.com.au



www.humphreywealth.com.au

Client Acknowledgement Form

Protecting Your Privacy

All personal information is collected, used & disclosed by Humphrey Partners and Radius Wealth, in line with the Radius Wealth Privacy Policy. Personal information may include identification, financial details and health information. Details of the Radius Wealth Privacy Policy can be found at <http://www.radiuswealth.com.au/privacy-statement/>.

We require the following consents, before we can provide any advice or services to you:

- I consent to my personal information being collected, used and disclosed, in line with the Radius Wealth Privacy Policy. I acknowledge that Humphrey Partners and/or Radius Wealth may disclose my personal information to third parties, government agencies, consultants, contractors, product providers or service providers as required to provide our service to you and to meet our professional and legal requirements.
- I consent to my personal information being held on software and third-party servers in our office and via the internet (cloud).
- I consent to my adviser contacting me with information that may be relevant to my situation.
- I acknowledge that my identification information will be required before any services are provided.

Tax File Number

I consent to Humphrey Partners recording and retaining my tax file number (TFN) and providing it to external parties for the provision of financial services.

Electronic Communication

I consent to the use of electronic means to provide information, acknowledgements, and agreements, as appropriate. Emails sent from the email address used for this form can be taken as my instruction, acknowledgement or agreement and I confirm any email address provided by me is secure and can only be accessed by me.

In addition, I agree to receiving the following via electronic means, or by being shown where and how they can be accessed on the internet or a secure site:

- Current and future Financial Service Guide (FSG) versions,
- Statements of Advice (SoA) (including any documents that form part of an SoA),
- Product Disclosure Statements (PDS) and other product offer documents, and
- General or any other relevant correspondence.

Please note you may change your mind at any time so that you receive paper documents.

Third Parties

I consent to my information being disclosed to the third parties who are nominated by me. In providing personal advice, your Humphrey Partners adviser(s) is required to make reasonable enquiries to obtain complete and accurate information about your personal circumstances to discharge their obligation to act in your best interests.

Professional Advisers

I consent to my adviser and Humphrey Partners to liaise with my professional advisers (accountant, stockbroker, solicitor/lawyer, bank, mortgage broker, etc.) to make reasonable enquiries to obtain complete and accurate information about my personal circumstances to discharge their obligation to act in my best interest.

Disclosure to Spouse/Partner

I consent to my personal information being released to my spouse or partner, unless and until my consent is withdrawn in writing.

Acknowledgement

By signing below, I provide my acknowledgement, consent, agreement and/or authorisation in relation to each of the items that have been acknowledged above, *Humphrey Partners Corporate Authorised Representative No. 328517 and Radius Wealth AFSL No. 530266* (including its employees, directors, representatives (as this term is defined in the Corporations Act) and agents for both entities).

Name: _____

Email: _____

Phone: _____

Signed: _____

Date: _____

CAF Ver 3 [Feb-24]