



Success Employee Benefits

PTY(LTD)

An Authorised Financial Services Provider No:14400

CLIENT ADVICE DECLARATION

(Single Need)

I, the undersigned, confirm that I require financial advice and/or a financial product regarding my financial provisions, from:

- **Success Employee Benefits (FSP NO. 14400)** represented by Ivan Perovic,

I confirm having been informed that a FSP must, prior to providing a client with advice and/or selling a product,

- obtain from the client appropriate and available personal and financial information and conduct an analysis, based on that information, for purposes of the advice, and,
- Take reasonable steps to ensure that the client understands the advice and/or product and that the client is in a position to make an informed decision.

However, I confirm that I do not want such a financial needs analysis because I know which type of product and/or products I need.

I confirm that I have agreed to the following:

I confirm having been duly and properly advised of the full implications of my actions and, having considered same, I hereby declare that I am aware of the fact that:

- as a full analysis could not be undertaken that there may be limitations on the appropriateness of the advice;
- I must carefully consider whether the advice on its own is appropriate considering my financial needs, objectives and situation;
- to prevent the risk of concluding a transaction that is not appropriate to my financial needs, objectives and circumstances, I should obtain a full financial needs analysis.

Client:

NAME

ID NUMBER

SIGNATURE

DATE

ON BEHALF OF SUCCESS BROKERS

IVAN PEROVIC

SIGNATURE

DATE

