Client's name		
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## Confidentiality agreement

We regard your personal information as confidential and we will therefore take appropriate action to safeguard it against unauthorised disclosure. We will securely store this information, and will use it, for the sole purpose of the provision of on-going financial services to you. This information may only be disclosed to authorised parties under the following circumstances:

- · where you have authorised such disclosure in writing;
- · where disclosure is required in compliance with any act, regulation or regulatory directive; or
- where a court with appropriate jurisdiction orders such disclosure.

Advice	agreement
MUVICC	agreement

Client	Client and Partner

	Priority*						
Retirement Planning	Critical	High	Medium	Low	Not licenced	Review later	
Planning for Retirement	•	er.					
Moving Into Retirement							
Post Retirement Review							
Notes:							
Notes:							

	Priority*							
Investment Planning	Critical	High	Medium	Low	Not licenced	Review later		
Saving for a Specific Goal								
Providing for Children's Education								
Investing a Lump Sum to Preserve or Grow Capital			-	Ŧ		-		
Investing a Lump Sum to Provide Income								
Manage an Existing Investment	,		1.					
Build Up an Emergency Fund						-		
Notes:								

Other	Priority*						
	Critical	High	Medium	Low	Not licenced	Review later	
Short Term Insurance							
Sanlam Reality					-		
Medical Aid		-					
Business Insurance							
Income Tax							
Wills					-		
Notes:							

## Advice agreement (continued)

Risk Planning			Priority*				
Death	Yes/No	Critical	Medium	Review later			
Provide income for partner of financial dependants							
Provide cover to repay the bond on your property							
Provide cover to repay financial obligations		×					
Provide cover for estate related fees and taxes							
Ensure sufficient cash to settle my estate				1 100000			
Provide for funeral costs							
Provide inheritance for your heirs				,			
Provide cover for maintenance payments							
Make provision for education expenses		=					
Other							
Disability	Yes/No	Critical	Medium	Review late			
Provide cover to replace lost income							
Provide cover to repay debt							
Cover large expenses (e.g. house, car alterations)							
Provide cover for medical expenses	,						
Provide cover for maintenance payments							
Other							
Dread Disease	Yes/No	Critical	Medium	Review late			
Provide cover to replace lost income							
Provide cover to repay debt				-			
Cover large expenses (e.g. house, car alterations)							
Provide cover for medical expenses							
Other							
	THE RESERVE OF THE PARTY OF THE	CONTRACTOR WANTED TO CONTRACTOR SALES					
impairment	Yes/No	Critical	Medium	Review late			
Impairment Cover large expenses (e.g. house, car alterations)	Yes/No	Critical	Medium	Review late			
	Yes/No	Critical	Medium	Review late			
Cover large expenses (e.g. house, car alterations)	Yes/No	Critical	Medium	Review late			
Cover large expenses (e.g. house, car alterations) Provide cover for medical expenses	Yes/No	Critical	Medium	Review late			
Cover large expenses (e.g. house, car alterations)  Provide cover for medical expenses  Provide cover for ongoing care expenses	Yes/No Yes/No	Critical  Critical	Medium	Review late			
Cover large expenses (e.g. house, car alterations)  Provide cover for medical expenses  Provide cover for ongoing care expenses  Other							
Cover large expenses (e.g. house, car alterations)  Provide cover for medical expenses  Provide cover for ongoing care expenses  Other  Estate Analysis							
Cover large expenses (e.g. house, car alterations)  Provide cover for medical expenses  Provide cover for ongoing care expenses  Other  Estate Analysis  Provide cover for estate duty							
Cover large expenses (e.g. house, car alterations)  Provide cover for medical expenses  Provide cover for ongoing care expenses  Other  Estate Analysis  Provide cover for estate duty  Provide cover for estate related fees and taxes				Review later			
Cover large expenses (e.g. house, car alterations)  Provide cover for medical expenses  Provide cover for ongoing care expenses  Other  Estate Analysis  Provide cover for estate duty  Provide cover for estate related fees and taxes  Ensure sufficient cash to settle my estate	Yes/No	Critical	Medium	Review late			
Cover large expenses (e.g. house, car alterations)  Provide cover for medical expenses  Provide cover for ongoing care expenses  Other  Estate Analysis  Provide cover for estate duty  Provide cover for estate related fees and taxes  Ensure sufficient cash to settle my estate  Lifestyle Rewards	Yes/No	Critical	Medium	Review late			
Cover large expenses (e.g. house, car alterations) Provide cover for medical expenses Provide cover for ongoing care expenses Other Estate Analysis Provide cover for estate duty Provide cover for estate related fees and taxes Ensure sufficient cash to settle my estate Lifestyle Rewards Provide for Sanlam Reality Lifestyle Benefits	Yes/No	Critical	Medium	Review late			
Cover large expenses (e.g. house, car alterations) Provide cover for medical expenses Provide cover for ongoing care expenses Other Estate Analysis Provide cover for estate duty Provide cover for estate related fees and taxes Ensure sufficient cash to settle my estate Lifestyle Rewards Provide for Sanlam Reality Lifestyle Benefits Provide for Money Saver Card	Yes/No	Critical	Medium				

Client Signature	
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