

# Advisor Information Schedule

## CONTACT DETAILS

Advisor Name	Contact Person
Telephone Number	Cellphone Number
Email	
Residential Address	Postcode
Postal Address	Postcode
Name of Investor / Client	

## ADVISOR NOTE

I am responsible:

- To ensure that the Risk Profile set out on page 3 of the Mandate (Paragraph 3.2) is aligned with the selected portfolio set out in the Investor Information Schedule.\*
- That the portfolio chosen is appropriate to the Investor/Client.
- Providing investment advice to the client.

## Advisor Signature

	Date DD / MM / YYYY
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\* Note – as a guide only: Risk Profile 1 (Cash Portfolio) which Magwitch does not offer, Risk Profile 2 (Bond or Conservative Portfolio), Risk Profile 3 (Moderate Portfolio), Risk Profile 4 (Growth Portfolio), Risk Profile 5 (Equity Portfolio)