Authority to Transfer Servicing Rights

RAVEN WEALTH

Administrator's details		Policy holder's address	
Administrator name:			
Scheme name:			
Address:			
		Ongoing Fee:	Other Fees:
		% p.a.	£

Dear Sirs,

This Transfer of Service Agreement / Letter of Authority confirming my request to transfer the servicing of my existing policies and plans to Raven Wealth (a trading style of Eadon & Co Ltd). It also allows Raven Wealth access to any relevant information and to charge any initial and/or ongoing fees as agreed with me in line with the firm's standard client fee agreement.

I have read, understood and agree to the terms, conditions and charges detailed in the Disclosure Documents provided to me separately from Raven Wealth.

I have agreed to an annual advice service fee as specified above, which is to be paid monthly by deduction from the policy unless specified otherwise.

Signed: Date:

SIGN HERE

Policy details

Policy numbers:			
Forename/s:		Surname:	
Date of birth:		National Insurance no.	

Please note that as we are advising the client on important matters involving their retirement planning, it is important that we receive this information as a matter of urgency so that we are able to do so fully informed and in compliance with The FCA's COBS 9 Rule (Suitability). We would refer you to the FCA's TCF Rules Outcome 6 (Unreasonable post-sale barriers).

Advisor details

Name:	Steve Hunt	IFA, Consultant & Chartered Insurance Risk Manager
Address:	**Administration Address (use)** Raven Wealth Stable Cottage Water Lane South Witham NG33 5PH	**Registered Address** Raven Wealth (as a trading style of Eadon & Co Ltd.) 83 Ducie Street Manchester M1 2JQ
Tel/email:	01476 347470 enquires@ravenwealth.co.uk	FCA number: 816029