CLIENTS ADVICE RECORD

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| NAME OF CLIENT:          \_\_\_\_\_\_\_\_\_\_\_  DATE OF INTERACTION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  | | | | |
| WAS A COMPREHENSIVE NEEDS ANALYSIS DONE? | YES | | NO | | |
| WAS A RISK ANALYSIS COMPLETED? | YES | | NO | | |
| DIFFERENT FINANCIAL PRODUCTS CONSIDERD: | QUOTES SEEN | | YES | | NO |
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| NEEDS/ITEMS THAT WERE CONSIDERD AND ACTIONS TO TAKE: | | | | | |
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| SUGGESTED PRODUCTS/ FUTURE PLANS AND PRIORITIES | | | | | |
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| A STATUTORY NOTICE AND DISCLOSURE LETTER WAS PRESENTED | | YES | | NO | |

THE ADVICE IS BASED ON CORRECT INFORMATION PROVIDED BY THE CLIENT OR THE THIRD PARTY.  
I THE UNDERSIGNED NOTE THAT IF I CANCEL OR SURRENDER MY POLICY; I WILL MANAGE AND AMEND MY OWN PERSONAL PORTFOLIO.

Client Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Broker signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| Ashburton |  | Medihelp |  |
| Bestmed |  | Medshield |  |
| Bonitas |  | Momentum |  |
| Brightrock |  | Old Mutual |  |
| Discovery |  | Profmed |  |
| Fedhealth |  | Sanlam |  |
| FMI |  | Sirago |  |
| Hollard |  | Stratum |  |
| Liberty |  |  |  |
| Medgap |  |  |  |