

# Existing Client Agreement

Client Name: \_\_\_\_\_ Partner's Name: \_\_\_\_\_  
Client Address: \_\_\_\_\_

Product Recommendation	Reasons Why	Date (dd/mm/yyyy)

## DECLARATION :

I confirm that \_\_\_\_\_ representing Professional Portfolio International ("the Company") has:

- 1) Supplied me with the brochure of the relevant product to read and retain for future reference;
- 2) Explained fully and to my satisfaction the type of product recommended, with particular attention having been paid to my attitude to Investment Risk, the charging structure (including, if relevant, how initial units work) and any possible cancellation penalties which I may incur;
- 3) Explained to me that unit values can go down as well as up, and that past performance is not necessarily a guide to future performance.

For my part I understand, agree with and accept the advice I have been given, including recommendations of the above and I also understand and agree that:

- 1) The Company acts as my agent but it will receive a commission from the financial institution with which business is placed;
- 2) My contract will be directly with said institution and I may, at any time, cease to avail myself of the Company's services;
- 3) Whilst projections of future performance have been shown to me illustrating up to a 12% annual growth rate, no warranties as to the actual performance of the recommended investments were made, either on behalf of the Company or by the individual representative concerned;
- 4) The investment recommended to me is a medium-to long-term investment and not suitable for a short-term trading.

I have been provided with a copy of the written recommendations/ product illustration made by my personal financial adviser.

Signature: \_\_\_\_\_ Place: \_\_\_\_\_ Date (dd/mm/yyyy): \_\_\_\_\_

If recommendations have been made to your partner, which he or she intends to act upon, your partner should sign below after first reading all the above.

Signature: \_\_\_\_\_ Place: \_\_\_\_\_ Date (dd/mm/yyyy): \_\_\_\_\_