the drawer
we'll mind it from here

Phone 087 428 2705
Oakdene, 10 Ballinderry, Mullingar, Co. Westmeath

Transfer of agency

To whom it may concern,

Please circle the name of life companies you have plans with:

Irish Life | Aviva | New Ireland | Royal London | Zurich | Standard Life

Client's name (1st party) _____ **Date of birth** _____

Client's name (2nd party) _____ **Date of birth** _____

Maiden name _____ **Please sign in maiden name** _____

We wish to confirm that we have appointed **The drawer**, to act as our Financial Adviser in relation to the above-numbered plan/s and any other plans held with your company in our name. Please note this agency change to your records. Please provide **the drawer** with details of the plans held upon request.

Are you or any close family members or associates considered a Politically Exposed Person (PEP)?

A PEP is someone who holds (or has held) a prominent public position, such as a senior government official, judge, military officer, or leader of a political party. Please circle answer.

Yes | No

If you're not sure, feel free to ask — we're happy to help clarify.

Many thanks,
Regards,

Signed _____ **Signed** _____

Print name _____ **Print name** _____

Dated _____ **Dated** _____

Ferris Financial Planning Ltd trading as The Drawer and Ferris Financial Planning is regulated by the Central Bank of Ireland.

Register Number	Director	Registered Office
723041	Richard Ferris	Oakdene, 10 Ballinderry, Mullingar, Co. Westmeath, Ireland