Compendium
INSURANCE BROKERS

Compendium Insurance Brokers (Pty) Ltd. Authorised Financial Services Provider FSP10405 and FSP10409. Company Registration No. 2000/009588/07

Tel: 087 285 4040 Fax: 087 238 6388 www.cig.co.za

SINGLE NEED ANALYSIS AND RECORD OF ADVICE

Compendium cares about your privacy and Compendium and your insurer(s) or potential insurer(s) has to process the personal information you provide when completing this form. The information will be treated with caution and all reasonable security measures have been implemented to protect your personal information.

Date of Advice	
Financial Advisor Name	
Client Name	
Policy Number	

CONTENT OF DISCUSSION

DECLARATION BY CLIENT

You have indicated the fact that, at this stage, you would not require a detailed analysis of your current financial position, and you would instead like to apply exclusively for

You are invited to take up our offer of comprehensive needs analysis, as soon as is convenient to you

Signed on		at	

Signature of Client (duly authorised)	
Financial Advisor Name	
Financial Advisor Signature	

I.We,		request that no financial needs analysis be done. I understand and accept

that without a full financial needs analysis all my financial needs may not be addressed properly. I am aware that I have the right to request a financial needs analysis at any time.