

## Terms of Business Acknowledgement Letter

Terms of Business Effective Date 7<sup>th</sup> December 2022

Client Name: \_\_\_\_\_

### Capital Financial Planning Limited trading as Capital Financial

#### Status

Capital Financial Planning Limited trading as Capital Financial ('the Company') is regulated by the Central Bank of Ireland.

#### Terms of Business

Attached are the Company's Terms of Business, which outline the basis on which we provide services to our clients. Please ensure that you read this document carefully. These Terms of Business apply to all business transactions undertaken for you or services provided to you and will remain in force until further notice. Should we make any material changes to our Terms, we will advise you in advance of providing any further services to you.

Customer Signature .....

Date.....

## Consent to Contact

Here at Capital Financial we take your data protection seriously and will only use your data as discussed with you in our privacy statement.

However, from time to time we may wish to contact you in relation to other Life, pension & Investment products, updating you on offers, services and competitions that we provide that we feel may be of interest to you.

#### Agreed methods of contact

Email

Phone

SMS

Post

Please do not contact me

Customer Signature ..... Date.....

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