

## CHANGE OF SERVICING AGENT

From: Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

To: Insurance/Investment Co. \_\_\_\_\_

Re: Policy/Account Numbers: \_\_\_\_\_

EUI Agency Code: \_\_\_\_\_

### **Letter of Authority - Request for appointment of a new Financial Adviser**

In respect to all policies/accounts detailed above and any others you may hold, I/we understand that this will involve the ongoing authority for my/our new Adviser to:

- obtain policy information and request the transfer of
- servicing rights; be responsible for giving financial advice;
- provide ongoing servicing in respect to all policies detailed above and others you may hold

**This authority will remain in place until I/we cancel it in writing.**

I/We further instruct that the payment of remuneration payable under my/our policies to my/our new and previous Financial Advisers should be as detailed below.

#### **Adviser Commission (Renewal/Trail)**

I/We confirm the transfer of any ongoing commission to my/our new Adviser.

#### **Ongoing Adviser Charges (deducted from my/our policies) to be paid to my/our new Financial Adviser.**

I/We hereby give authority for the above policy/ies, and any other that I/we may hold with you, to be serviced by:-

**EUI Private Wealth Ltd  
26 Upper Pembroke Street  
Dublin DO2 X361  
Ireland**

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_