

# BLUE OCEAN

## FINANCIAL PLANNING

ESTABLISHED SINCE 1995

Dear Sir / Madam

**Name** \_\_\_\_\_

**National Insurance No.** \_\_\_\_\_

**Date of Birth** \_\_\_\_\_

**Address** \_\_\_\_\_

I wish to appoint Blue Ocean Financial Planning as my Financial Adviser.

Please therefore accept this letter as my authority to transfer the servicing rights of the below mentioned policy and any other that you may hold in my name to Blue Ocean Financial Planning.

Please release any information that they may require.

<b>Client signature</b>	
<b>(Print name)</b>	
<b>Policy number</b>	
<b>Scheme reference if applicable</b>	
<b>Provider name</b>	
<b>Provider address</b>	
<b>Date</b>	

