



# P.K. FERRARIS & ASSOCIATES

Insurance & Investment Brokers



## LETTER OF ENGAGEMENT

### AUTHORIZATION TO REQUEST INFORMATION

I, the undersigned \_\_\_\_\_

Identity number: 

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hereby authorize any member of the staff of **P.K. Ferraris Insurance Brokers CC**, to obtain any information on my behalf regarding my assurance – Life, Short Term and/or Investment Portfolio, and any of my employee benefits, from any life office, retirement fund or other financial institution.

Client signature: \_\_\_\_\_

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

### CLIENT DETAILS

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

Tel no: (H) \_\_\_\_\_ (W) \_\_\_\_\_ (C) \_\_\_\_\_

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

Insurance Company: \_\_\_\_\_

Policy Number(s): \_\_\_\_\_

### APPOINTMENT OF NEW OFFICIAL CARE INTERMEDIARY

I further request the financial institutions with whom **P.K. Ferraris Insurance Brokers CC** has a sales agreement, to indicate **Patrick Kevin Ferraris** on their records as my official care intermediary.

I have been properly counseled on the consequences of this letter of appointment.

This appointment may be revoked by me in writing at any time.

Client signature: \_\_\_\_\_

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

**NB: Any changes must be initialed by the client**



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## INTERMEDIARY INFORMATION COMPANY AND CODE

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### LIFE AND FUNERAL

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Assupol	: 21768	1Life	: 0354
Discovery Life	: 1066855733	Old Mutual	: 715211
Fairbairn Capital	: PK Ferraris	Old Mutual Group Schemes	: BKFG57
FMI	: MB004101	PPS	: 123804060
Hollard	: PK Ferraris	Sanlam	: A00988650
Investment Horizon	: 6173333330028	Stanlib	: 1242403
Liberty Life	: 6173333330028	Universal Funeral	: PK Ferraris
Momentum	: 551213		

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### MEDICAL AID

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Bestmed	: 0999	Momentum Health	: 551213
Bonitas / Fedhealth	: 600050	Profmed	: 123804060
Discovery Health	: 1066855733	Resolution Health	: SB11400
Liberty Gap (Zestlife)	: IF0749	Stratum	: PFIB
Medshield	: 62370432	Universal	: B034
Medihelp	: A0897		

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### SHORT TERM PERSONAL AND COMMERCIAL

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Aberlade	: PK Ferraris	Momentum	: 525309
Absa	: 99999999	Mutual & Federal	: 658790
Alexander Forbes	: 3805	1Sure	: 354290
Auto & General	: PE9964	PPS	: 0468
BnB Sure	: PKFER	Santam	: 9748/004
CIA	: 02021	Unity	: UN15641
Cyclesure	: PKF	Wheels	: 105539
First For Women	: FFSB15641	Zurich	: 018358
Hollard	: PKFIB01B		

**NB: Any changes must be initialed by the client**

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