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INVESTMENTS
PENSIONS
DEPOSITS
LIFE INSURANCE

Client Name & Address: _____

Terms of Business – Client Acknowledgement

I acknowledge that I have been provided with a copy of the Terms of Business for Melvin Life & Pensions Ltd t/a Melvin Financial Services and confirm that I have read and understand them.

Direct Marketing

I confirm having read the paragraphs in relation to Data Protection in the Terms of Business, and consent to Melvin Life & Pensions Ltd t/a Melvin Financial Services making contact with me by letter, phone, email or SMS text in relation to the range of services provided by us or its associates or partnership companies and to the sharing of relevant information as indicated.

Consent to Contact

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

However, from time to time we may wish to contact you in relation to investments, pensions, insurance or deposit products we provide.

If you consent to us contacting you, please tick below to say how you would like us to contact you:

Post Email Mobile Landline Home Landline Work Text Message

I/we agree

Notes (if applicable)

What is the best time of the day for us to call you?

Before noon Afternoon Evening

I/we agree

Notes (if applicable)

Signed: _____

Dated: _____



Signed: _____

Dated: _____

Last Updated 10/03/2021

