

17<sup>th</sup> February 2020

<Title> <First Name> <Last Name>  
<Address>  
<Suburb> <Postcode>

Dear <Title> <Last Name> or <Client First Name>,

Zoetic Pty Ltd has been looking after your financial planning needs as an authorised representative of GWM Adviser Services Limited an Australian financial services licensee.

We have recently have decided to move from GWM Adviser Services Limited to another Australian financial services licensee, Poynter Hargraves Financial Consultants Pty Ltd. The change will be effective from 26<sup>th</sup> March 2020. I personally will be retiring from the Industry and will no longer be an Authorised Representative to give Financial Advice; however I will be a consultant with Poynter Hargraves for an extended period after this effective date to ensure the transition is a smooth as possible for you and all our clients.

#### **What does this mean for you?**

1. Zoetic will change our name to Poynter Hargraves and we will continue to look after your financial planning needs as an authorised representative of Poynter Hargraves Financial Consultants Pty Ltd from our existing Mackay office.
2. Poynter Hargraves Financial Consultants Pty Ltd will have access to your personal and financial information.
3. There are **NO changes** to any financial products you may have in place (e.g. superannuation, insurance or investments.)
4. Any future advice or financial services provided by Poynter Hargraves will be conducted as usual and will be the responsibility of Poynter Hargraves Financial Consultants Pty Ltd.

#### **Next steps**

**You do not need to do anything** as a result of this change. If you do nothing, we will continue to look after your financial planning needs as an authorised representative of Poynter Hargraves Financial Consultants Pty Ltd.

If you no longer wish to be a client of Zoetic Pty Ltd and do not wish to transfer to Poynter Hargraves Financial Consultants Pty Ltd please complete the form overleaf and return it to GWM Adviser Services Limited by 2<sup>nd</sup> March 2020.

We look forward to continuing to work with you working with you to achieve your financial goals.

If you have any queries please contact us on 07 4953 4082 or [heather@zoetic.net.au](mailto:heather@zoetic.net.au)

Yours sincerely,

Heather Woods  
Authorised Representative

GWM Adviser Services Limited

17<sup>th</sup> February 2020

**Client Nomination Form**

Transition Management  
GWM Adviser Services Limited  
C/- Marie Mulherin  
Email to: [transition.management@mlc.com.au](mailto:transition.management@mlc.com.au)  
Level 2NW, 105 – 153 Miller Street  
North Sydney 2060

Dear Transition Management

In response to the notification letter I received from Zoetic Pty Ltd advising me of their departure, please be advised that I do not wish to move to Poynter Hargraves.

I understand this means my previous representative Heather Woods will no longer provide me with financial planning advice.

(tick one of the below)

- Please arrange for an adviser to contact me to discuss my financial situation and future needs.
- I do not require an Adviser. Please cease my relationship with both GWM Adviser Services Limited & Zoetic Pty Ltd.
- I already have a new Financial Adviser. My adviser will arrange for my Servicing Rights Transfer to them. Please remove the current adviser from my account.

Should you wish to contact me, please do so on the following number:

My preferred contact Phone Number is: \_\_\_\_\_

My policy numbers and relevant product issuers are:

Policy/Account Number*	Product Issuer*

Yours sincerely,

\_\_\_\_\_

Name

\_\_\_\_\_

D.O.B

\_\_\_\_\_

Signature

\_\_\_\_\_

Date Signed

*\*The Licensee may not be able to process your request without the Policy Number and Product Issuer details.*