



OLLIE MORAN FINANCIAL SERVICES

Ollie Moran Financial Services Ltd - Terms of Business Acknowledgement Letter Effective Date: V2 31/03/2020

Client Name(s): _____

Status

Ollie Moran Financial Services Ltd is regulated by the Central Bank of Ireland.

Terms of Business

Attached are the Company's Terms of Business, which outline the basis on which we provide services to our clients. Please ensure that you read this document carefully. These Terms of Business apply to all business transactions undertaken for you or services provided to you and will remain in force until further notice. Should we make any material changes to our Terms, we will advise you in advance of providing any further services to you.

Print Name: Signed: Date:

Print Name: Signed: Date:

Consent to Contact

Here at Ollie Moran Financial Services Limited we take your data protection seriously and will only use your data as discussed with you in our privacy statement. However, from time to time we may wish to contact you in relation to other financial products and services we provide, our Newsletter and any other offers.

Agreed methods of contact*:

- ☐ Email
- ☐ Phone
- ☐ Post
- ☐ Please do not contact me/us.

** Even if you do subscribe now you can always unsubscribe at any time.*

IMPORTANT NOTICE:

As part of our service to you we will provide regular updates on your policies. These updates will be issued by un-encrypted emails unless you instruct us to issue these by post.

It will be your responsibility to ensure that the contact details provided to us are correct. Please tick one of the following:

- ☐ I am happy to receive correspondence by un-encrypted email. I understand that this may contain personal information.
- ☐ I prefer to receive my correspondence by post.

Print Name: Signed: Date:

Print Name: Signed: Date:

Yours Sincerely,

Ollie Moran, QFA, CFP

Unit 5C, Whitethorns, Castletroy Limerick

T: 061 337578 F: 061 201578 E: info@olliemoranfs.com W: www.olliemoranfs.com

Registered in Republic of Ireland at Unit 5C, Whitethorns, Castletroy Limerick. Registration No: 453739.

A private company limited by shares trading as Ollie Moran Financial Services Limited.

Directors: Ollie Moran & Lisa Quinlan. Member of Brokers Ireland.

Ollie Moran Financial Services Limited is regulated by the Central Bank of Ireland