



Are you adequately protected?

Following our discussions regarding your finances, there may be a need for you to review your insurances. Under law, only an Australian Financial Services (AFS) Authorised Representative can provide financial product advice or insurance advice.

Therefore, I urge to you speak to an adviser from alphaLEND's insurance affiliate Lifestyle Assurance (an Authorised Representative of Professional Investment Services). Lifestyle has extensive experience in financial planning industry and risk management.

If desired, a Lifestyle adviser can offer a risk review at no charge (for the initial 1-hour consultation). This process may identify the need for you to:

- review existing risks
- structure your existing insurances more tax effectively
- protect your family and/or your business more comprehensively
- reduce your insurance premiums
- structure your existing insurances to improve your cash flow
- improve the terms of your existing policies

1. To accept this invitation, please sign the below section and I will pass on your details to Lifestyle who will then contact you accordingly. In doing so, you acknowledge the above and you also give consent for us to provide some of your personal information to the adviser for the purposes of providing you with financial planning / insurance services.

✓ YES PLEASE	_____ Signature	_____ Signature
	Name: _____	Name: _____
	Date Signed: _____	Date Signed: _____
	Pref Contact : _____	Pref Contact : _____

2. If you do not wish to accept this offer, please sign and date below to acknowledge that alphaLEND has explained the importance of having your personal insurance cover reviewed. You acknowledge that you (or your business) may not be adequately protected in case of disability or death and that you have chosen not to have this need reviewed.

✗ NO THANKS	_____ Signature	_____ Signature
	Name: _____	Name: _____
	Date Signed: _____	Date Signed: _____