



Broker Application

Brokerage Name: _____

Postal Address	
Phone	
Mobile	
E-mail	
Website	

Details of last 3 year's production (If you don't have it by company, total over all will suffice)

	20__			20__			20__		
Company	Risk AP	Sav AP	Inv LS	Risk AP	Sav AP	Inv LS	Risk AP	Sav AP	Inv LS

Please give brief background of Practice & Principal

Please give reasons for wanting to join the Planet group

I/We understand that, by signing this statement I agree to the following :

I/We agree to allow such checks on my/our background as Planet Financial Services Limited see fit. These checks will not necessarily be limited to the referees I have nominated.

I/We agree to allow a check on my/our credit history.

I/We agree to allow companies with whom we place business to make production details available to Planet's board on an ongoing basis.

Signed _____
Position _____

Witnessed _____

Name _____

Address _____

Dated _____ day of _____ 20____

Please note that the following items must accompany this application.

- 1. Copies of current data gathering forms/templates.**
- 2. Details of your needs analysis tools.**

Privacy Act

Planet Financial Services Limited complies with the Privacy Act 1993 when dealing with personal information
We collect and use this personal information for the sole purpose of assessing your application
The Privacy Act 1993 gives you the right to request access to and correction of, your personal information
The information will be stored securely at Planet's offices; currently 14 Queen Natalie Place, Royal Heights, Auckland