

Request to provide information to a Third Party/Change of Servicing Adviser



This form must be completed when there is a request by the Member to:

- Provide information to an adviser other than the current Servicing Adviser
- Request a change to a new Servicing Adviser

MEMBER TO COMPLETE

Member name

Policy number

Date

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Providing access to your policy information

You may authorise nib to provide an adviser who is not your current Servicing Adviser with access to your nib policy information (this does not change your current Servicing Adviser). To do this, please complete the following:

Tick this box

I/We authorise nib to provide information about my/our policy to the adviser noted below, but do not wish to change my/our Servicing Adviser.

Signed by Policy Owner(s)

Date

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Changing your current Servicing Adviser

You can replace your current Servicing Adviser with a new Servicing Adviser who will then automatically have access to your nib policy information and receive annual renewal communication. To do this, please complete the following:

Tick this box

I/We wish to change the adviser responsible for the servicing of my/our nib policy to the adviser noted below.

I/We understand that there may be financial consequences to our current and new adviser.

Signed by Policy Owner(s)

Date

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nib will advise your current Servicing Adviser that you have made the request above. Where you have checked the box to change your Servicing Adviser, nib will action this request after 30 days, after which time your current adviser will cease to have access to detailed information about your policy.

New Adviser to complete in either case

New adviser name

nib unique adviser number

Where a change in Servicing Adviser has been selected above, I accept the Member appointment and any financial considerations that are associated with being noted as the adviser for the above Member(s) policy with nib.

Signed by new adviser

Date

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Please email to: advisersupport@nib.co.nz