NOVUS
WEALTH MANAGEMENT

Wynyard Park House, Wynyard Avenue,
Wynyard, Stockton on Tees, TS22 5TB
T: 01740 667099
E: enquiries@novuswealth.co.uk

Third-party Authorised Person Authority

I authorise Novus Wealth Management Ltd to give information and provide valuations to the 'Authorised Person' named below.

- The authority ONLY relates to the provision of information & data.
- The AUTHORITY DOES NOT extend to any other authority, for example agreeing to new investments, fund-switching or any form of encashment.
- The 'Authorised Person' cannot sign any forms or declarations on behalf of the client.
- The 'Authorised Person' must be aged 18 or over and of sound mind.
- The authority will REMAIN IN FORCE until cancelled by the client in writing.
- Novus Wealth Management Ltd may periodically request that the form is reviewed and re-signed.

Name of Authorised person: ________________________________

Address: ____

Relationship to client / account holder: _______________________

Agreed method of how they will be identified: ___________________________

CLIENT DECLARATION

I agree that Novus Wealth Management Ltd can disclose all details of my holdings, investments, pensions & valuations to ………………………………………………… until further notice. I undertake to inform Novus Wealth Management Ltd immediately should there be any material change in my relationship with ……………………………………………. .

Signed ………………………………………………………. Date …………………………………

Name of client …………………………………………….

AUTHORISED PERSON DECLARATION

I agree to keep all information confidential. This authority can be withdrawn at any time, without notice.

Signed ………………………………………………………. Date …………………………………

Name of authorised person ……………………………………………

Firm use:
How is the authorised person already known to the firm?
How will the firm identify them each time?