

# Money Plus

Mortgages Pensions Investments Income Protection Life Assurance Specified Illness Financial Restructures Wealth Management

## Terms of Business Covering Letter

May 2013

Client(s) Name(s): \_\_\_\_\_

Money Plus Financial Brokers Limited trading as Money Plus – About Us

### Status

Money Plus Financial Brokers Limited trading as Money Plus is regulated by the Central Bank of Ireland.

### Terms of Business

Attached are the Money Plus Terms of Business, which outline the basis on which we provide services to our clients. Please ensure that you read this document. 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.

### Data Protection

Money Plus are very aware of the confidentiality associated with your personal details. We fully endeavour to comply with data protection principles at all times. The data which you provide to us will be held on a computer database and paper files for the purpose of arranging transactions on your behalf.

We would also like to keep you informed of various mortgage, insurance, investment, and any other services provided by us or associated companies with which we have a formal business arrangement, and which we believe may be of interest to you.

### Client Acknowledgement

#### Terms of Business

I / we acknowledge that I / we have been provided with a copy of the Terms of Business of Money Plus and confirm that I / we have read and understand them.

#### Authority to Contact

I / we consent to Money Plus making contact with me by letter, phone – home/work/mobile, email, or SMS text (delete as appropriate) in relation to the business conducted and to the sharing of relevant information as indicated.

In addition to the business conducted, Money Plus may contact you around further services which we feel may be of relevance to you.

If you do not wish to avail of these services, please tick here

Signed: \_\_\_\_\_ Date: / /

Signed: \_\_\_\_\_ Date: / /

Yours Sincerely,

Eamonn Kielty & Liam Cashell  
Money Plus

[info@moneyplus.ie](mailto:info@moneyplus.ie) Tel: 071 919 4000 Fax: 071 9144679 [www.moneyplus.ie](http://www.moneyplus.ie)

Harmony Hill, Sligo & Barrack Street, Ballaghaderreen, Co Roscommon.

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Directors: Eamonn Kielty & Liam Cashell.