



PURCHASER INSTRUCTION FORM

Please complete the table below and fax it to us on 09-520 5141. The more complete the information you provide, the greater our opportunity will be to locate a business that suits your requirements.

Contact Name	
Business Name	
E-mail address	
Mailing Address	
Preferred Contact Number	
Experience and Qualifications	
Agency Agreements held	
Product providers you prefer to deal with	
Product providers you prefer not to deal with	
Type of business required (tick as many as apply)	Risk Insurance General Insurance Investment Advisory Mortgage Broking Reverse Mortgage Loans
CRM system used	
Geographical preference	
Preferred client type (i.e. occupational category, preferred age band etc.)	
Your budget for the purchase	
Number of clients you are looking to buy?	

Other comments: _____

Experience has shown us that in some cases our clients may have specific ideas about the business they would like to buy in part or in full. This can be as specific as the name of the broker or adviser concerned. We are happy to approach them directly, but without declaring your identity. We have found this process to be successful in many cases.