

REGISTRATION OF REFERRER

NAME (as in NRIC) : _____

Preferred Name : _____

NRIC Number : _____ Date of Birth: _ _ _____

Address : _____

Contact Numbers : Office _____ Home _____ HP: _____

Email Address : _____

Company : _____

Occupation : _____

Note: Referrer's main responsibilities, but not limited to, are:

- 1) Must submit a Will Request Form when introducing a client to Will and Legacy Pte Ltd
- 2) Ensure client is ready to write a Will because meeting with Will Adviser should not be an education session for the client. Periodic Will seminars are available for such purpose.
- 3) Arrange appointment to make the necessary introduction to Will Adviser.
- 4) Arrange for client to attest his/her Will at one of WAL's Wills Centres.
- 5) To assist WAL to collect any fees, if necessary.

Date: _____ Signature: _____