



Banc Ceannais na hÉireann
Central Bank of Ireland

Eurosystem

Statement of Authorised Status

MB Planning Limited t/a Clear Financial ('the firm') (Ref. No. 98750) is authorised under Section 10 of the Investment Intermediaries Act, 1995 (as amended).

As a Multi-Agency Intermediary, **MB Planning Limited t/a Clear Financial** is authorised to receive and transmit orders to product producers from whom a written letter of appointment is held, in relation to:

1. Shares in a company or bonds that are listed on a stock exchange, prize bonds
2. Units or shares in undertakings for collective investment schemes, including unit trusts and UCITS
3. Tracker bonds
4. Insurance policies
5. Personal Retirement Savings Accounts (PRSAs)

The firm may also give investment advice only in relation to investment instruments available from those product producers from whom an appointment is held.

When receiving and transmitting orders in relation to insurance policies and/or PRSAs, the firm may only accept cash or cheques/bank drafts from clients payable to itself where:

- (i) an insurance undertaking has invited renewal of a policy of insurance, or
- (ii) a proposal for insurance and/or PRSAs has been accepted by an insurance undertaking.

In all other circumstances cheques/bank drafts or other payment instruments must be made payable to the product producer.

For and on behalf of the Central Bank of Ireland:

Signed: *Éoin Hawker*

Signed: *P. Donnelly*

