Klarstig

Financial Services Communications Consent

Record a specific permission, the purpose for which it is requested and any limits. The organization must make the proposed use and applicable notice available before asking for a decision.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Organization requesting permission *

Specific purpose of the proposed use *

Information activity or material covered *

Who may receive or use the information *

Period of permission or expiry date *

Your decision for the stated purpose *

- ☐ I give permission
- ☐ I do not give permission

Restrictions or questions

Notice or information document provided *

Name of the person recording the decision *

Date of decision *

Specific details

Communication channels covered by the request

Complete when relevant to this request.

Topics frequency and recipients covered by the permission

Operating context

Service area and case reference

Complete when relevant to this request.

Authorized reviewer supporting information and handling restrictions

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- The wording is a starting point, not legal advice, and has not been reviewed for your jurisdiction. Have your own counsel review it before use.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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