

Request for Plan Management Letter

Attention: NDIA Planner

Re: PLAN MANAGEMENT for

Participant: _____

NDIS Number: _____

After reviewing all options for managing the funding within my plan – **self-managed, plan managed, or agency managed** – I have decided to endorse a registered Plan Manager to manage my NDIS funds and pay service providers on my behalf.

Could you please include the following support items in my plan to help me achieve my goals:

CB Choice & Control:

14_033_0127_8_3 (Financial Intermediary set up costs)

CB Choice & Control:

14_034_0127_8_3 (Financial Intermediary Monthly Processing x ___ months)

My plan is on the PACE system and I would like to endorse Plan Tracker as my plan manager for my NDIS plan. Plan Tracker's registration number is [4050012016].

Please endorse Plan Tracker from _____ (which is the start date of my current plan) and enter the end date as 'ongoing'. I will provide an end date when I am ready.

Could you please confirm this endorsement so I can advise Plan Tracker.

Kind regards,
