

Client Agreement

This outlines the basis of our agreement with you and confirms the services and the fees agreed.

DATA PROTECTION STATEMENT

Full Details of our Data Protection statement and policy are in the document that was issued to you separately.

How to withhold your consent:

Please tick this box if you DO NOT consent to us or any company associated with us processing **sensitive personal data** (This could impact upon our ability to provide you with certain types of product or service and may ultimately result in us being unable to provide them to you at all)

Please tick this box if you ARE happy for us or any company associated with us to contact you for marketing purposes.

Please tick this box if you ARE happy for us to send you documents such as illustrations and reports as attachments by email. Secure email (registration required)

Email address to use:

ONGOING SERVICE AGREED

Full Service

Limited Service

No ongoing Service

FEES AGREED

An upfront fee of £ for a review and strategy report or for lifestyle financial planning

A monthly fee of £ / % on regular premium contracts

An advice and implementation charge of % of the initial investment paid to Monetary Solutions, together with an annual fee of % of the fund value, again paid to Monetary Solutions as payment for ongoing service

Fees to be paid: Advice & implementation Direct by client By provider (deducted from investment)
Ongoing service Direct by client By provider (deducted from investment)

Bespoke charges and services (to be determined after discussion & analysis)

.....
 A commission/remuneration paid by the provider of the policy/service to Monetary Solutions to pay for their time and expertise. (N.B. This box should only be used in respect of annuities, legacy products, general insurances, mortgages/equity release and protection policies.)

CLIENT'S CONFIRMATION AND CONSENT

I confirm that I have received a full copy of the Client Agreement (pages 1 to 9).

This is our standard Client Agreement upon which we intend to rely. For your own benefit and protection you should read the terms with our Client Agreement carefully before signing, as by signing you consent to the terms contained within, including authorisation to transfer information between parties as described in the Client Agreement. If there are any terms within this agreement that you do not understand, please ask for further information. The Client Agreement will come into effect from the date of acceptance of this agreement, which will be confirmed by the date provided in the 'date of signature box' below, unless otherwise stated.

Customer Name(s) in Block Capitals

Date of Issue

Customer Signature(s)

Date of signature