

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 may ultimately result in us being unable to provide you with some products or services)
- 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
- Please confirm you are still happy for us to use the email address we have in our database for any correspondence

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, paid by provider (deducted from investment)

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.

How fees are to be paid (delete as appropriate):

Advice & implementation paid direct by client/ paid by provider (deducted from investment)

Ongoing service paid direct by client/ paid 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 option 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 12)

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): _____

Date of Issue: _____

Signature: _____

Date Signed: _____

Signature: _____

Date Signed: _____