



Client Agreement – Home Finance & Protection Planning

Part 3 – Client Consent

(v01.18)

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1. INTRODUCTION

This part of our Client Agreement confirms the services you have selected and the charges for those services. Our Client Agreement consists of four parts.

This Part 3 must be read in conjunction with our:

This agreement sets out the terms under which our Services are to be provided.

This document must be read in conjunction with:

- | | |
|--|--|
| • Client Agreement (Home Finance Advice & Protection Planning) – Part 1 – General Information and Responsibilities | which sets out the terms under which our services are to be provided |
| • Client Services Brochure | which provides full details of what is included in each of our services |
| • Client Agreement (Home Finance Advice & Protection Planning) – Part 2 – Services and Charges | which provides an overview of services we offer, our charges for delivering those services and payment methods |

If you have not been provided with copies of any of these documents, please ask your adviser for one or view them on our website at www.investorsplanning.co.uk

This is our standard Client Agreement upon which we intend to rely.

Therefore, for your own benefit and protection you should read these terms carefully before signing them.

If you do not understand any point please ask for further information before signing them.

This Client Agreement replaces any previous agreements and understandings we have with you, and will only be modified where confirmed in writing.

2. YOUR CONSENT

I/We acknowledge that the Client Agreement will come into effect from the date of signature.

I/We authorise the transfer of personal information, on a confidential basis and in accordance with the Data Protection Act 1998, between Investors Planning Associates Ltd and any relevant third parties.

I/We agree that Investors Planning Associates Ltd or any such relevant third party may contact me in the future by any means of communication (including by electronic communication e.g. email) considered appropriate at the time.

cont'd



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2. YOUR CONSENT (cont'd)

Services & Charges Agreed

Initial Service	<input checked="" type="checkbox"/>	Details of agreed fee			
Home Finance Advice (One-Off)	<input type="checkbox"/>	Broker Application Fee	<input type="checkbox"/>	Agreed fee	£395
		Fee	<input type="checkbox"/>	Minimum of £750 per client applies	<input type="checkbox"/>
				Agreed fee	£
		Commission	<input type="checkbox"/>	Estimated commission	£
		Balance Payable on Completion	<input type="checkbox"/>	Estimated balance	£

I/We agree to pay the Broker Application Fee on production of an invoice

(If applicable) I/We agree to pay the Home Finance Advice Fee on production of an invoice immediately following delivery of your service

Protection Planning Report (One-Off)	<input type="checkbox"/>	Fee	<input type="checkbox"/>	Minimum of £750 per client applies	<input type="checkbox"/>
				Agreed fee	£
		Commission	<input type="checkbox"/>	Estimated commission	£

(If applicable) I/We agree to pay the Protection Planning Fee on production of an invoice immediately following delivery of your service

Further details of service agreed

Client Name(s)	<Title> <FirstName> <LastName>	<Title> <FirstName> <LastName>
Client Signature(s)		
Date of Signing		
Associate Name	<Title> <FirstName> <LastName>	
Associate Signature (on behalf of Investors Planning Associates Ltd)		
Date of Signing		



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