



# Client Agreement – Home Finance & Protection Planning

## Part 3 – Client Consent

(v06.18)

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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](http://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 acknowledge that the Client Agreement will come into effect from the date of signature.

I authorise the transfer of personal information in accordance with the IPA Privacy Notice.

I agree that Investors Planning Associates Ltd or any such relevant third party may contact me in the future in connection with these agreed services by any means of communication (including by electronic communication) considered appropriate at the time.

*cont'd*



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Planning**

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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"/>	Fee	<input type="checkbox"/>	Number of properties	
			<input type="checkbox"/>	Minimum of £1,000 per property applies	<input type="checkbox"/>
		Commission	<input type="checkbox"/>	<b>Agreed fee</b>	<b>£</b>
			<input type="checkbox"/>	<b>Estimated commission</b>	<b>£</b>
Balance Payable on Completion	<input type="checkbox"/>	<b>Estimated balance</b>	<b>£</b>		

(If applicable) I 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 £1,000 per client applies	<input type="checkbox"/>
			<input type="checkbox"/>	<b>Agreed fee</b>	<b>£</b>
		Commission	<input type="checkbox"/>	<b>Estimated commission</b>	<b>£</b>

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

**Further details of service agreed**

<b>Client Name</b>	
<b>Client Signature</b>	
<b>Date of Signing</b>	
<b>Associate Name</b>	
<b>Associate Signature</b> (on behalf of Investors Planning Associates Ltd)	
<b>Date of Signing</b>	