

ADVICE FEE AUTHORITY FORM

The Old Post Office, 4 Bryanston, Blandford, DT11 0PR
t: 0800 368 8163 e: info@gfp-uk.com www.gfp-uk.com

GFP UK is a trading style of Goodale Financial Partners Limited which is an appointed representative of Quilter Financial Services Limited and Quilter Mortgage Planning Limited which are authorised and regulated by the Financial Conduct Authority.
Goodale Financial Partners Limited is registered in England and Wales. Registration Number: 11350548.
Registered Address: The Old Post Office, 4 Bryanston, Blandford Forum, United Kingdom, DT11 0PR



AUTHORITY TO PROCEED

For your own benefit and protection, you should read these terms carefully before signing. If you do not understand any point, please ask for further information.

My fee structure is set out in the terms of business I issued to you.

TOB Version Issued	Date Issued
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There may be occasions in the future where the work required is greater than anticipated and, as a result, we may need to increase our fee. Should this situation arise, we will contact you to discuss the reasons why and agree a way forward and this will be captured in our suitability report.

We have agreed to provide the following services to you. We have also agreed the following charges and methods of payment for our services:



INVESTMENTS INITIAL ADVICE

Amount of payment for our initial advice service	£ , calculated as % of the single premium invested.
	£ % of the regular premiums invested in the first 12 months.
	A flat fee of £
	An hourly rate of £ per hour for an estimated hours.
Minimum fee if advice does not proceed	A fee of £
	No fee
Method of payment for our initial advice service	Paid via the Provider
	Paid directly by you
	Both
Is VAT applicable? <i>(N.B. If VAT becomes applicable at a later date due to any investment solutions we recommend, we will tell you about this before arranging investment into the solutions)</i>	This fee is not subject to VAT £ , or % of the fee is subject to VAT at the rate of % This means a total fee of £



ONGOING SERVICE FEE CONFIRMATION

By taking up our ongoing service, you will receive the following **Core Services**

Core Services

An annual Progress Check meeting to review your plans, current circumstances, and objectives to help ensure that your financial planning remains on track. ✓

An annual report of your plans and investments within the scope of our advice, so that you can see your current position and progress towards your objectives. ✓

A recommendation on whether any switches to your investment funds are suitable and beneficial for you. ✓

Confirm in writing whether your plans and investments continue to be suitable based on your stated objectives and risk appetite. ✓

Assistance with the administration of your plans and support with any third-party provider interaction, as required. ✓

Telephone and e-mail access to your adviser (and wider support team), allowing you to quickly address any questions or concerns that you might have between regular scheduled progress check meetings. ✓



ONGOING SERVICE FEE CONFIRMATION

Please tick to confirm the level of service applicable for investment:

Ongoing Servicing – Core Services

Ad Hoc. Meetings will be arranged as needed and paid for as initial advice (see above)

Amount of payment for on-going service	A percentage annually of the value of your product / portfolio invested via ourselves of 1%. This equates to approximately £ , and will increase or decrease in line with the plan values.		
	A flat fee of £		
This ongoing fee will be subject to the following minimum levels of payment	no minimum fee applies. a minimum figure applies of £		
Method of payment for on-going service	Paid via the Provider Paid directly by you Both		
Is VAT applicable?	This fee is not subject to VAT.		
<i>(N.B. If VAT becomes applicable at a later date due to any investment solutions we recommend, we will tell you about this before arranging investment into the solutions)</i>	% of this fee is subject to VAT. This equates to approximately £ and will increase or decrease in line with the plan values.		



YOUR CONFIRMATION

By signing this document, you are agreeing to our terms and the fees that we will charge for our services

Client name	Client name
Client signature	Client signature
Date	Date

