

# Client Support Agreement

## For Investment and Pension Plans

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This agreement is issued on behalf of Truly Private Clients



Represented by: (Adviser Name)

And: (Client Name)

And: (Client Name)

Residing at: (Client Address)

  
  
  
  
  
  
  

This agreement is supplementary to the Client Advice Agreement that I have already discussed and supplied you with and sets out the basis on which we charge for our services.

To clarify all parties' expectations and provide fairness and transparency of charges, we set out the support strategies available and associated costs in this document. Please get in touch with us if you wish to discuss any aspect of these terms.

### Ongoing Client Support

Your financial and personal objectives may alter over time due to changes in your lifestyle or circumstances. Ensuring that the investment or pension plan we recommend continues to be suitable for you is essential. Therefore, we highly recommend you agree to one of our ongoing client support strategies.

We offer our clients a choice of ongoing Client Support Strategies as we recognise that all clients do not have the same requirements. Even though we provide brief guidelines for our different strategies, we hope you agree to a strategy that best suits your specific needs and those of our recommended products. Therefore, we may advise you to select different strategies for different products to maximise the value and efficiency of achieving the best outcomes.

All our client support strategies include access to our web portal, which provides valuations to your plan (in most circumstances), secure access to email your adviser, and access to view supporting documents and other beneficial information.

It should be noted that should you decide not to select one of our Client Support Strategies, there will be no access to our web portal.

Should we need to increase or change our charges, you will be given notice of this fact and the opportunity to decide whether to continue with the revised charges.

Plan Type:  Provider:  Plan Number:  Current Investment Amount:  £

Business Type:  
 New Business  Transfer of Servicing

**Our fees for ongoing Client Support Strategies:**

Please tick the box for the strategy you require

Client Support Strategies		Fees*	Strategy required
Digital	Vero only + monetary target No regular reviews, self monitoring Web portal & App, impulsave®, client rewards, values to target	0.35%	
Virtual	Vero or any other suitable provider At least 12-month review virtually e.g. on Teams Product documents received via email	0.5%	
Active	Vero or any other suitable provider At least 12-month review in person Product documents presented and discussed with by the Adviser in person	0.7%	

\*Ongoing charge is based on the initial value of your investment. This can increase or decrease in line with your investment.

I understand that the fee for this service is based on % of the value of the plan each year.

I agree that the cost of the ongoing Client Support Strategy to be paid by (please tick relevant box):

A deduction from the policies held (recommended)  
 Being paid directly by me on a monthly/quarterly/yearly basis

In signing this Client Support Agreement, I confirm that the changes have been fully explained to me.

**I understand that I can cancel this support facility at any time by contacting Truly Independent Ltd or the plan provider, at no extra cost.**

Client Name .....

Signed .....

Date .....

Client Name .....

Signed .....

Date .....

**On behalf of Truly Independent Ltd®**

Adviser Name .....

Signed .....

Date .....

