

Client Support Agreement For Investment and Pension Plans

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This agreement is issued on behalf of Truly Independent Ltd



Represented by: (Adviser Name)

And: (Client Name)

And: (Client Name)

Residing at: (Client Address)

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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.

Tick this box if the Client Support Strategy is to apply to all plans.

If the client has agreed to multiple support strategies, please specify below the plans which this service agreement will apply to. A separate Client Support Agreement will be required for each strategy.

Plan Type:	Provider:	Plan Number:	Current Investment Amount:
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>

Business Type:

New Business
 Transfer of Servicing
 Existing Client

Our fees for ongoing Client Support Strategies:

Please tick the box for the strategy you require

	Digital*	Virtual	Active	Active Plus
	0.35% p.a.	0.50% p.a.	0.70% p.a.	1% p.a.
Policy values visible online ¹	Y	Y	Y	Y
Secure messaging with your adviser	Y	Y	Y	Y
Secure document facility	Y	Y	Y	Y
Integration with online banking	Y	Y	Y	Y
Mentoring on achieving financial goals	Y	Y	Y	Y
Annual suitability assessment	N	Y	Y	Y
Annual review of circumstances, objectives and risk profile	N	Virtual	Face-to-Face	Face-to-Face
6-monthly review of circumstances, objectives and risk profile	N	N	N	Virtual or Face-to-Face
Indicative annual cost (based on an initial investment of £50,000)	£175.00 p.a.	£250.00 p.a.	£350.00 p.a.	£500.00 p.a.
Select the strategy you require				

¹subject to provider price feeds

**Due to its unique goal monitoring features, our Digital service is only available to clients investing on Truly Independent's own platform, VERO.*

*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 a percentage of the plan value 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 charges 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

