



AUTHORITY TO PROCEED

This document confirms the fees and terms and conditions that apply to our work with you. It does this by confirming:

- which documents you have been issued with, upon which we can both rely
- any specific fees agreed with you for providing advice, implementation or ongoing services
- the method of payment of those fees and cash equivalent examples where required

SECTION A

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.

DOCUMENT PROVIDED	DATE GIVEN	VERSION REFERENCE
Guide to Mortgages and Protection		GTMP.QFP.RES.05
Terms of Business		TOB 13
Privacy Notice		Version 6

YOUR CONFIRMATION

I have received, and reviewed the above literature provided.
 I give authority to proceed under the terms and conditions described.
 I note that minimum fees may apply.

Client name:	Client name:
Client signature:	Client signature:
Date:	Date:

SECTION B

INITIAL/ADVICE FEE CONFIRMATION

Brief description of advice / service provided	Implementation of a
Method of payment for advice / implementation	Commission from the lender.
Mortgage - Amount of payment for advice / implementation	<input type="checkbox"/> a fee of £_____ for initial meeting <input type="checkbox"/> a fee of £_____ for advice <input type="checkbox"/> a fee of £_____ for implementation <input type="checkbox"/> a fee of £_____ for advice and implementation <input type="checkbox"/> a fee of £_____ for _____ <input type="checkbox"/> no fee in this instance
Protection - Amount of payment for advice / implementation	<input checked="" type="checkbox"/> no fee as paid via commission from the insurance provider <input type="checkbox"/> A fee.

ONGOING SERVICE CONFIRMATION

We will make reasonable endeavours to contact you to arrange a review of your mortgage and protection needs. This ensures that you are not paying more than you need to, as well as reassuring you that your current arrangements are still the most appropriate for your needs.

Target date to make contact for mortgage review	3-6 months prior to any product ending
Target date to make contact for protection review	3-6 months prior to any product ending

YOUR CONFIRMATION

I have read the literature provided and the terms and conditions that apply to both the advice / implementation service and the ongoing service I wish to subscribe to.	
Client name:	Client name:
Client signature:	Client signature:
Date:	Date: