



PLEASE DETACH, COMPLETE, SIGN AND RETURN THIS PAGE TO US

tick box if you would like us to email back a copy of this signed document

I/We sign this copy of the Client Agreement, confirming that I/we have read the above terms and am/are agreeable to Roberts Clark Independent Financial Solutions Limited acting as my/our Independent Financial Adviser.

I/We authorise them to receive any information they may request about my/our financial affairs, policies and or plans. I/We authorise Roberts Clark Independent Financial Solutions Limited to pass information on a confidential basis, when warranted, to such authorised companies in their dealings with me/us.

I/We agree that this Client Agreement will come into effect from the date of issue and will remain in force until replaced or terminated by me/us or Roberts Clark.

Ongoing Service Options

Please the service you require and also how it should be paid for.

**Bronze
No Cost**

Enrolment onto this service is **automatic** unless you tell us in writing that you do not wish to receive any form of service from us, once the work you have engaged us for has been completed. This is a 'pay as you go' service.

Main Service Options	Non Face to Face (paid up front or monthly)		Non Face to Face (paid in arrears at end of year)	Face To Face (paid up front or monthly)		Face To Face (paid in arrears at end of year)
	Single Payment	Monthly Standing Order	At the end of the Review Year	Single Payment	Monthly Standing Order	At the end of the Review Year
Payment Basis for Silver, Gold and Platinum Services						
Silver (Full Website Access) (+ 2 guidance sessions per year)	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
Gold Yearly (up to 1 policy/fund)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gold Yearly (up to 3 policies/funds)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gold Yearly (up to 6 policies/funds)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gold Yearly (7+ policies/ funds)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Platinum Quarterly (up to 6 policies/funds)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Platinum Quarterly (7+ policies/ funds)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Having the Cost of your Service Paid from your Policy: please the box

It is sometimes possible to have the cost of your chosen service paid from your policy. If you would like to use this option (assuming it is available) please the box.

How much is the Money MOT Service? A description of each service level above and their relevant fees are detailed in the brochure "Look after your Money – financialadvice.net's Money 'MOT' Service".

Signature:

Date:

Print Name:

Signature:

Date:

Print Name:

ClientAgreement_V9210217

PLEASE RETURN TO:

If posting in UK (company name must be in CAPITALS)

Freepost ROBERTS CLARK

If posting from overseas

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