



INDEPENDENT
FINANCIAL
MANAGEMENT

Northwich Office

Drake House, Gadbrook Way,
Gadbrook Park,
Northwich, Cheshire,
CW9 7RA

Nantwich Office

Bank Chambers,
3 Churchyardside,
Nantwich, Cheshire,
CW5 5DE

☎ 01606 338914 ✉ hello@hwifm.co.uk

SERVICE & FEE AGREEMENT

This agreement is to confirm and formalise our recent discussions regarding the financial planning services which we provide. The agreement can be broken at anytime by either party giving notice in writing.

We will agree an initial service level with you and this will be confirmed in writing, before any work is undertaken. Your service level will be reviewed internally at least on an annual basis and adjusted as appropriate. We will discuss this with you at your next review meeting.

Minimum service income refers to the annual income we receive from you. This can be paid directly from any investments or pensions you hold with us, through a standing order paid directly from your personal account or a combination of the two.

Name:		Name:	
Address:			
Post code:			

New Client to Practice		
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Current Level of Service	
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We are Independent Financial Advisers and are authorised and regulated by the Financial Conduct Authority. FCA 101022

Your Consent

This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing them. Please sign both copies of this agreement, and return one copy to us. If you do not understand any point please ask for further information.

Please confirm if you are happy to give your express consent to contact you by telephone to discuss advising on or arranging financial or insurance products in future?

Please tick one box only: **Yes** **No**

Initial Fees	Ongoing Fees	Agreed Advice & Services

Signed by:	
(For and on behalf of HWIFM)	
Signed by:	
Print Name:	
Signed by:	
Print Name:	
Date Issued:	