



new thinking..

ASQUITH HART LTD

Client Agreement and Fee Structure

Asquith Hart Client Service Options

Standard Service 0.5%

Includes

- Annual policy specific review
- Annual statements and performance updates
- Newsletter's and industry updates via the Asquith Hart website
- Annual budget report via the Asquith Hart website
- Unlimited email and telephone contact with your adviser and all support staff

Based on a £100,000 investment this would equate to £500 per annum

Enhanced Service 0.75%

Includes

- Annual financial review of all policies held and a full financial planning review
- Cash Flow forecast service
- Further ad hoc adviser meeting
- Annual Discretionary Fund manager meeting where applicable
- Newsletter's and industry updates via websites
- Budget updates via websites
- Unlimited email and telephone contact with your adviser and all support staff

Based on a £100,000 investment this would equate to £750 per annum

CLIENT AGREEMENT - Your Consent

Please read this Client Agreement carefully: This document details our standard terms and conditions of business upon which we rely. For your own benefit and protection you should read these terms carefully before signing them. If you do not understand any point, please ask us for further information.

Please sign both copies of this agreement and return one copy to us.

I/we authorise the transfer of information, on a confidential basis when warranted between any such third parties. I/we acknowledge that this agreement will come into effect from the date of signature.

I/we also confirm that I/we give/do not give (delete as appropriate) Asquith Hart Limited my/our express consent to contact me/us by telephone to discuss advising on or arranging financial or insurance products in future.

Client name(s):

Client signature(s):

Date first signed by each client:



ASQUITH HART LTD

**Asquith Hart Ltd is an Appointed Representative of Lyncombe Consultants Limited
who are Authorised and Regulated by The Financial Conduct Authority FRN 618025**

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