

KRD Financial Advisers Limited

Services and Payment Agreement

The fees agreed for the advice and implementation of your financial needs.

Services Agreed	Cost £	VAT £ (If applicable)
Total Cost	£	£
Ongoing Service Plan (Tick as appropriate) Standard <input type="checkbox"/> Enhanced <input type="checkbox"/>	Standard (0.65% pa) Enhanced (0.80% pa)	Total Cost Including VAT (if applicable) £
Based on your initial investment the ongoing adviser charge of 0 . % pa will equate to an approximate annual charge of £	£	£

(Example - £100,000 investment on "Standard" = £100,000 x 0.65% = £650.00 per annum)

Fees for the services agreed above are due within 30 days of signing this agreement, unless agreed to deduct them from a Financial Services product.

The Ongoing Service Plan is based on a percentage of your investments, subject to a minimum annual payment as shown in our **"Menu for Services"** document. The ongoing service charge can go down as well as up depending on investment performance.

Delete as appropriate

- A) I / We wish to proceed on the basis of your costs as set out in this letter and enclose a cheque for £.....
- B) I / We wish to proceed on the basis of your costs as set out in this letter I / We agree to the cost being deducted from My /Our Platform/WRAP/Investment product.

Investment fees are to be debited from (please specify which product fees will be debited from/ or leave blank for all polices to be debited

.....

I / We agree to subscribe to the Ongoing Service Plan – Standard / Enhanced
I / We will receive the advice and service standards agreed in accordance with that plan.

The Annual Ongoing Service Plan is payable monthly in arrears.

The Annual Ongoing Service Plan can be cancelled at any time with one months’ notice in writing.

I / We agree to pay for the Ongoing Service Plan by: Please circle one item below

Deduction from my Investments / Standing Order / Cheque / Credit/Debit Card

Or

I / We do not wish to receive any on-going service

Please note this agreement is in addition to our standard service proposition.

Signed by the client:

I / We confirm to pay the fees agreed

Client Signature:	Client Signature:
Print Name:	Print Name:
Date of Signature:	Date of Signature:

Signed on behalf of KR D Financial Advisers LtdDate.....

KRD Financial Advisers Ltd agree to deliver the advice and service standards of the selected plan as detailed overleaf. This document should be read in conjunction with our Services Proposition and Keyfacts document supplied to you.

Notes

- 1. If Adviser Charges received in any one year is less than the minimum fee for your Service Plan, you will be charged a fee for the difference on the anniversary of the plan.
- 2. Please complete standing order
- 3. BACS payment details:

Bank Name	
Name of Account	
Account number	
Sort Code	
Please quote reference	KRD Adviser Charge (Your Name)