

fiducity fiducia
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fiducia

wealth management & wealth preservation
fiduciawealth.co.uk

CLIENT AGREEMENT



REPORT FEE AGREED

Please tick depending on preference.

£

To be invoiced

Or

To be deducted from product/investments arranged*

The report fee will apply whether or not you proceed with our recommendation. If you decide not to go ahead, VAT will be added to this fee. If you do proceed with our proposals, initial and ongoing fees may apply, and will be clearly outlined in your recommendation report. No fees will be charged without your prior agreement.

* Please note that report fees can only be deducted from a product if you proceed with advice through to the implementation stage.

MARKETING

If you consent to contact for this purpose, would you tick the options below to advise how you would like to be contacted:

Post

Email

Telephone

If you do not tick any of the above options, we will reasonably assume that you do not wish to be contacted by us with regard to additional investment, pension or financial arrangements and services other than if Fiducia Wealth Management believe there is a legitimate interest to provide information which may have an impact on your investments.

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ANTI-MONEY LAUNDERING REQUIREMENTS

To comply with the Money Laundering Regulations 2007, we are required to undertake anti-money laundering checks for each private client. Where possible our preferred method is by electronic check undertaken by a third party. This includes the verification of a government-based photo document.

These checks do not leave a footprint on your individual record, nor do they extend to a credit check.

A valid government document with photograph includes:

- A valid passport
- A valid photocard driving licence (full or provisional)
- A national identity card
- A firearms certificate or shotgun licence
- An identity card issued by the electoral office of Northern Ireland

In some instances, this form of verification may not be acceptable in which case we will ask for further documents to satisfy our regulatory requirements. We will advise you if this is necessary and what additional documentation is required.

By signing the consent, you are agreeing that this authority remains valid until cancelled by you in writing.

CONSENT

I/we confirm I have read and understood the 'Fiducia Services' and Terms and Conditions provided to me/ directed to on the Fiducia website/Portal.

I/we agree to the fees detailed above.

I/we confirm my agreement to the marketing preferences and consent or otherwise, for Fiducia to contact me about additional arrangements and services.

I/we confirm my consent for Fiducia to undertake regulatory checks by electronic verification and agree to provide additional documentation if requested to.

SIGNATURE DECLARATION

Name	<input type="text"/>
Signature	<input type="text"/>
Dated	<input type="text"/> <input type="text"/> <input type="text"/>

Name	<input type="text"/>
Signature	<input type="text"/>
Dated	<input type="text"/> <input type="text"/> <input type="text"/>

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