Client declaration

This document represents our standard Terms of Engagement, upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing below. If you do not understand any point please ask for further information.

Our typical charges are based on the Scale of Fees outlined above. This Agreement is designed to confirm and formalise our discussion regarding the services we provide.

Where our ongoing charges are based upon a percentage of the funds invested or on-going contract value, due to the ease of calculation, we will not confirm the fee in specific monetary terms. We will, however confirm the likely scope of this fee in the initial suitability report and confirm fees paid at the annual reviews.

You should seek legal advice in respect of your own specific requirements to ensure the validity of this agreement.

An invoice in respect of Professional Advice Fees will be raised upon completion of the initial service, or upon completion of any associated transaction/s or product/s, to meet the cost of our services to you.

I/We acknowledge that the client agreement will come into effect once it has been signed by all parties and will remain in force until terminated.

I/We confirm that I/We are UK resident, and that all advice given by Prime Wealth on their products and services will be given whilst on UK soil.

I/We also confirm that I/We will also notify Prime Wealth immediately, if there are any change to my/our residential address.

Any ongoing service has been agreed whilst you remain a UK Resident. I/We confirm that should I/We become a resident of any other country in the future that I/We will need to inform Prime Wealth as soon as this happens if I/We wish to continue to engage your services.

This agreement is governed and shall be interpreted in accordance with English law and both parties shall submit to the exclusive jurisdiction of the English Courts.

Fee agreement

Initial planning fees: please select one of the following options:

	Planning	Implementation
Tick this box if you agree that our initial Fees are to be deducted from your investment	☐	☐
Tick this box if you agree to pay our initial Fees by cheque/bank transfer	☐	☐

On-going Management Services: please opt in or out of on-going services below

Tick this box if you agree to pay our agreed fee for on-going management services, by annual / monthly deduction from your investment ☐

Tick this box if you do not require any on-going services. Your investments will not be kept under review, and any services you request in future may be subject to further charges ☐

Agreed initial planning fees

Notes

Customer Name(s)		
Customer signature(s)		
Date		
Adviser		
Date of issue		