Legal & General Financial Advice Limited
4th Floor Chadwick House
Warwick Road
Solihull
B91 2AA

Client Agreement L&G Financial Advice

Client Agreement for one-off Advice Services

Thank you for choosing our services. Before we proceed, we kindly ask you to review and acknowledge the following agreement regarding the advice we provide. If there is something you don't fully understand, please ask for further information.

1. Purpose of this agreement

For your own benefit and protection, you should ensure that you read the Terms and Conditions that your adviser has provided you with carefully before proceeding with our service.

This form confirms your understanding and agreement of the Terms and Conditions provided by your adviser. By signing this form, you agree to pay the fee set out in section 4 of this document, for our advice, regardless of whether you choose to act upon it.

2. What you can expect from us

- We will provide professional, tailored advice based on the information you share with us.
- Our recommendations will be made in your best interest, with transparency and clarity.

3. Your acknowledgment

By signing this form, you confirm that:

- You understand that the advice service is chargeable.
- You agree to pay the fee for the advice, even if you decide not to proceed with the recommendations.
- You have had the opportunity to ask questions and are satisfied with the information provided.

4. Fees

The fee for our one-off advice service is: **£** ________
for advice in the following areas:

- ☐ **Retirement and Pension Planning**
- ☐ **Savings and Investment**
- ☐ **Both of the above**

Name ____________________

Signature ____________________

Date ____________________

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