




# INITIAL SET UP CHARGES

Our administration charges to implement the investment bond

Service	 <b>Bronze</b> <i>Pay per use</i>	 <b>Silver</b> <i>Automated Advice</i>	 <b>Gold</b> <i>Personal Service</i>
<p><b>Processing your application: including all administration and assistance *</b></p> <p><i>We will help you with either a paper based application or online submission through an IFA extranet.</i></p>	<p>£50 per hour</p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b></p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b></p>
<p><b>Anti-Money Laundering Check *</b></p> <p><i>This can be a desktop Anti Money Laundering check which we complete or a paper-based process.</i></p>	<p>£10 each check</p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b></p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b></p>
<p><b>Axxis consulting/ liaising with the investment bond providers *</b></p> <p><i>This includes business processing and ensuring the product provider has everything they require.</i></p>	<p>£50 per hour</p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b></p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b></p>
<p><b>‘Know Your Client’ Suitability Questionnaire *</b></p> <p><i>Our online Suitability Questionnaire asks you questions such as your tolerance to investment risk, need for income and inheritance tax issues.</i></p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b> If you complete our online or paper version</p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b> If you complete our online or paper version</p>	<p><input checked="" type="checkbox"/> <b>INCLUDED</b> We can do this “face to face” as a complimentary service at our Byfleet office or at your home, depending on location</p>