

Trafalgar Mortgages & Financial Services

AUTHORITY TO PROCEED

This document confirms the fees and terms and conditions that apply to our work with you. It does this by confirming:

- which documents you have been issued with, which lay out in detail the terms of our service.
- the amount of any specific fees agreed with you for providing advice, implementation or ongoing services
- the method of payment of those fees.

SECTION A

For your own benefit and protection, you should read these terms carefully before signing. If you do not understand any point, please ask for further information.

DOCUMENT PROVIDED	PROVIDED TO CLIENT		DATE GIVEN	VERSION REFERENCE
Guide To Our Services	YES	N/A	24/10/2025	GTOS.Q23_0346/QFP/sept 2023
Guide To Our Mortgage and Protection Services	YES	N/A	24/10/2025	GTMP.QFP.RES.05 219-0219/April 2021
Terms Of Business	YES	N/A	24/10/2025	TOB.MP.INT.RES.13.1
A description of advice / service / to be provided				
To advise on and implement your Mortgage & protection through to completion.				

YOUR CONFIRMATION

I have received, and reviewed the above literature provided. I give authority to proceed under the terms and conditions described. I note that minimum fees may apply.	
Client name:	Client name:
Client signature:	Client signature:
Date:	Date:

SECTION B

INITIAL/ADVICE FEE CONFIRMATION

Method of payment for advice / implementation	Commission Paid by Provider
Mortgage - Amount of payment for advice / implementation	<input type="checkbox"/> a fee of £_____ for initial meeting <input type="checkbox"/> a fee of £_____ for advice <input type="checkbox"/> a fee of £_____ for implementation <input type="checkbox"/> a fee of £_____ for advice and implementation <input type="checkbox"/> a fee of £_____ for _____ <input checked="" type="checkbox"/> no fee in this instance
Minimum fee if advice does not proceed	<input type="checkbox"/> a fee of £_____ <input type="checkbox"/> no fee in this instance
Protection - Amount of payment for advice / implementation	<input checked="" type="checkbox"/> no fee as paid via commission from the insurance provider

YOUR CONFIRMATION

I have read the literature provided and the terms and conditions that apply to both the advice / implementation service and the ongoing service I wish to subscribe to.	
Client name:	Client name:
Client signature:	Client signature:
Date:	Date:

ONGOING SERVICE CONFIRMATION

We will make reasonable endeavours to contact you to arrange a review of your mortgage and protection needs. This ensures that you are not paying more than you need to, as well as reassuring you that your current arrangements are still the most appropriate for your needs.

Target date to make contact for mortgage review	08/ 2027
Target date to make contact for protection review	__ / 20__
We have agreed not to provide an ongoing service	<input checked="" type="checkbox"/>

YOUR CONFIRMATION

I have read the literature provided and the terms and conditions that apply to both the advice / implementation service and the ongoing service I wish to subscribe to. I understand the fees that will apply for initial advice.	
Client name:	Client name:
Client signature:	Client signature:
Date:	Date: