



CLIENT AGREEMENT & DECLARATION

Client Consent

These are the standard terms and conditions upon which we, Henwood Court, intend to rely. Please raise any questions or queries about our standard terms and conditions with us before signing this document.

Please tick this box if you do not wish to be contacted for marketing purposes by e-mail, telephone, post or SMS.

PLEASE CONFIRM WHICH SERVICE YOU REQUIRE FROM HENWOOD COURT

Service		Tick the service that you require
Full Financial Health Check		
Investment & Pension Analysis		
Transactional Advice		
Ongoing Advice		
Private Client (Wealth Management) Service		
Advisory Service	Investment Management Service	
	Investment Management Program	
Transactional Service		

I/We hereby authorise the transfer of information, as described above on a confidential basis when warranted between such third parties. I/We agree that the Client Agreement will come into effect from the date of issue.

I/We confirm receipt of the relevant Client Service Charter that I have read in conjunction with this Client Agreement. I/We confirm understanding of the terms of engagement and that Henwood Court will receive 0.75% of funds under management to help pay for our ongoing service.

Customer Name(s)		
Customer Signature(s)		
Date of Declaration		

November 2009

