

OVERVIEW

OUR CLIENT ENGAGEMENT DOCUMENTS

We are pleased that we have decided to work together to improve your financial future and in order to confirm our appointment we need to complete and exchange the following documentation;

- **Client Agreement**
- **Fee Agreement**
- **Direct Debit Mandate**
- **Authorities to Act**
Transfer of Agency form for all existing Pensions, Investments & Insurances. This requires a wet signature.
- **HMRC 64-8 Authority**
This is only required if you do not have an ongoing relationship with an existing accountant. If you have a UTR (a ten-digit unique taxpayer's reference number) please provide and we can use that to register you online using our HMRC account. Alternatively complete the HMRC 64-8 authority, print, sign, and return by post because HMRC will require a 'wet' signature.

We prefer to use our digital signing facility with DocuSign, and we will send you a copy for you to digitally sign via your Personal Finance Portal (PFP) account.

However, these documents are all available as fillable pdfs on our Website and in your PFP document library so if you would prefer to use any other method of signing please feel free to do so