Client Name

Client Address 1

Client Address 2

Client Address 3

Postcode

Date

Dear Client Name

**Agreement to pay client fees directly from your Investment**

You have indicated that you wish to pay your fees to xxxxxxxxxxxxxxxx in relation to your investment directly from your investment premium(s). Please refer to the attached notes before completing this instruction. We will require a separate instruction for each plan you are taking out with Kingston Unity Friendly Society.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Product  **(tick one only)** | Investment Bond |  | Investment NISA |  | Regular Savings Plan |  |
|  | | | | | | |
| **Investment Bond or NISA** | **Lump Sum Investment £………………………………** | | | | | |
| **Please complete section A and where applicable section B**  **Initial fee in year 1 and ongoing fees (if applicable) from**  **year 2** | | | | | | |
| **A** Initial Fee | …………….% of initial investment | | | | | |
| **B** Ongoing Fee | ………………% of value of investment in year 2 and each subsequent year | | | | | |
| Initial fee will be paid by a reduction in investment  Ongoing fees will be paid by withdrawal from investment | | | | | | |
|  | | | | | | |
| **Regular Savings Plan or Regular Premium NISA** |  | | | | | |
| **Monthly premium of £.........................** | | | | | |
| **Please complete C & D below** | | | | | | |
| **C** Initial Fee | …………...% of the monthly premium, for the first 12 months | | | | | |
| **D** Ongoing Fee | ……………..% of the monthly premium, for the 13th and each subsequent month | | | | | |
| Fee will be paid by a reduction in invested premium | | | | | | |

I agree that I authorise Kingston Unity to make the payment instructed above directly to xxxxxxxxxxxxxxxxxxxxxxxxx

I agree that should I subsequently cancel my investment, that Kingston Unity will refund to me any monies due to me net of any fees paid directly to my IFA.

First Applicant Signature ………....................................................................

Name ……………………………………………………………………………………………………………………..

Second Applicant Signature …………………………………………………………………………………..

Name ……………………………………......................................................................

Date......................................................................