Rob Robbie

RumpSteak Cottage

Heads Hill

Southampton

SP219NN

10 March 2025

Dear Justin,

### Provider policies requiring your signature

We previously wrote to you on [Date] explaining that your Ongoing Advice Service charge with Attivo is being aligned to 1% per year of the value of the investments we advise you about.

As part of your service with us, we partner with a range of trusted providers, such as [Provider 1] and [Provider 2]. This helps us to build your personalised financial plan and support you to achieve your financial and lifestyle goals.

To ensure the continuity of your Lifestyle Financial Planning service, we kindly ask for your signature on the accompanying forms. This will let your policy provider know that you're happy to proceed with the standard rate.

### What do I need to do?

Please read these documents carefully and provide your signature and date where indicated by [Date].

If you have any questions or would like further clarification, please do not hesitate to get in touch with Client Services on 01242 585444 or [clientservices@attivo.co.uk](mailto:clientservices@attivo.co.uk). They will be happy to discuss this with you and answer any questions you may have.

Yours sincerely

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Description automatically generated with medium confidence

**Jon Stevens FPFS CMgr FCMI MBA**

Financial Planning Managing Director