OUR CONTRACT WITH YOU

We are committed to providing you with the highest level of advice and service. In order for us to understand what you expect from us, please complete the below on-going advice and service contract and return to Circle Wealth Partners.

1. How often would you like us to review your Wealth Portfolio?

Quarterly	☐	Half-yearly	☐	Annually	☐	Other	☐

2. How would you like to receive our communications, including our suitability reports, regulatory documentation and portfolio review documentation?

Encrypted Email	☐	Printed Documentation	☐

3. How would you like us to contact you?

Home Tel	☐	Work Tel	☐	Mobile	☐	Email	☐	Post	☐

4. Where is your preferred venue for your meetings?

Circle Offices	☐	Home	☐	Other (Please specify)

5a. E-Briefing Service – a personalised e-mail communication service that keeps you informed on the issues that might impact your wealth. You can update your preferences at any time. Would you like to receive this?

Yes	☐	No	☐

5b. If Yes, which services would you like to subscribe to:

Title	Frequency	Description	Subscribe
Investment Market Update	Daily	The latest headlines, news and data from markets around the world	☐
Market Bulletin	Weekly	The key financial and economic issues from the previous seven days	☐
Investment Insights	Fortnightly	A window on the world of markets and economies, including the latest views from our fund managers and perspectives on key investment matters	☐
The e-Investor	Quarterly	A magazine providing topical news, analysis and interviews on a range of wealth management issues	☐

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6. We host a range of events throughout the year, which have previously included Inheritance tax seminars, Specialist Investment presentations at the Shard, Henley Regatta, Palmersport motor racing, as well as an investment briefing at Sandown Park, to name a few. Would you be interested in attending any of these types of events? Please state below.

Charity	☐	Seminar	☐	Sport	☐	Leisure	☐
Social	☐	Other (Please specify)					

7. Online access to your Wealth Account 24 hours per day. Would you like us to set up your online access?

Yes	☐	No	☐

You can opt out of marketing communications or amend any of your preferences at any time by contacting your Partner or our Circle Offices using the contact details below.

Client Name	
Client Signature	

Client Name	
Client Signature	

Partner Name	
Partner Signature	

Dated:	

CIRCLE | WEALTH
PARTNERS

CHANCERY HOUSE, 30 ST. JOHNS ROAD, WOKING, SURREY, GU21 7SA

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