



Customer Fee Agreement

This agreement is between and you, our customer, and The Equity Release Partnership Limited. It sets out how we charge for our services when arranging a mortgage or loan. This document should be read together with the 'Terms of Business' which has already been provided to you.

Initial Personal Financial Review	
<ul style="list-style-type: none"> • Extensive product research • Presentation and Recommendation of proposed mortgage • Processing of your application • Suitability Report detailing your current situation and suitable recommendations 	Included

A fee will be charged as per the table below depending on the type of transaction, this is payable **on completion** for our service in relation to mortgage contracts. The exact amount will depend on the complexity and work involved in your case and will be confirmed as part of the advice process.

Our Charges	
For our services in obtaining for you an 'offer of advance' for the mortgage or loan our fee is:	
£Insert Fee	payable on application [delete/complete as appropriate]
£Insert Fee	for arranging the loan payable on offer [delete/complete as appropriate]
£Insert Fee	for arranging the loan payable on completion [delete/complete as appropriate]
Our total fee is £Insert Fee	

Our fee is in addition to any commission we may receive from the lender for the work we complete on their behalf; the exact amount will be disclosed in writing to you later in the process.

Refunds

If your mortgage/loan does not go ahead, you will receive a full refund.

I/We agree to the terms of this agreement and agree to pay for the services provided as detailed above.

Customer 1 Signature	
Customer 1 Name	Date

Customer 2 Signature	
Customer 2 Name	Date

For and on behalf of an appointed representative of The Equity Release Partnership Limited, which is authorised and regulated by the Financial Conduct Authority

Advisor Signature	
Advisor Name	Date

This agreement is made on the basis that if the loan does not complete, there will be no fee payable.

Please pay the fee to The Equity Release Partnership Ltd
Sort code: 60-83-71 | **Account:** 66062318
Reference: *Your Surname*