



## One Page Summary Document Of Our Services

1. We provide a claims management service that specialises in financial services claims relating to pensions or investments. Our service includes telling you whether or not we believe that you may have a valid claim, after we have studied evidence presented by you, or obtained by us, using your permission.
2. We will ask you to locate all the evidence that you can in relation to what happened at the time of the financial advice, and since then. We will then pursue the claim upon your behalf.
3. We will keep you updated with the progress of your claim with regular emails or calls – whichever you tell us you would prefer. You can also call us, free, at any time on 0800 254 5066.
4. We will charge a fee for our service, which is based upon FCA regulations regarding fees. The chart below shows you how fees will be applied.
- 5.

Redress band	Consumer redress obtained		Max rate of charge	Max total fee
	Lower	Upper		
1	£1	£1,499	30%	£420
2	£1,500	£9,999	28%	£2,500
3	£10,000	£24,999	25%	£5,000
4	£25,000	£49,999	20%	£7,500
5	£50,000	NA	15%	£10,000

6. If we do not win an offer of compensation for you that we have advised you to accept, we will not charge you a fee. Please also note that you can make a claim directly yourself rather than choosing to use a claims management company such as ourselves. For example: you can make a claim directly to the advice firm involved; if they reject your claim you can make a claim via the Financial Ombudsman Service (FOS); if the advice firm has ceased to trade, you may be able to make a claim via the Financial Services Compensation Scheme (FSCS).
7. Please also note that we will send you an invoice for our fee once you have been sent cleared funds in respect of your compensation award.
8. We will act with diligence to ensure that we only make a valid claim upon your behalf, and we expect you to be truthful in your presentation of relevant information to us.
9. You can contact our Partners, Gary Naylor or Ken Hanning, directly via their email addresses; [gary@assist.claims](mailto:gary@assist.claims) or [ken@assist.claims](mailto:ken@assist.claims).
10. You can cancel your agreement with us within the 14 day cooling off period for no charge. If you cancel after the cooling off period we reserve the right to charge a **Termination Fee. We calculate this at £150 per hour** if we have incurred costs in respect of your claim investigation.