DANIEL BLOOMFIELD
WEALTH MANAGEMENT

Service Agreement

To help you plan for a balanced life, now and into retirement, we provide the following service:

PORTFOLIO MANAGEMENT SERVICE

- Annual review meetings
- Advice/meeting notes as follow up to review meeting
- Unlimited phone or email contact
- 24/7 online portfolio access
- Annual risk rating review
- Annual portfolio rebalancing
- Financial education
- Invitations to St. James's Place client events
- Referrals to our trusted Partners where necessary

In addition to this you can receive a detailed personalised financial plan, incorporating a lifetime cashflow analysis once per year, or more frequently, as required, for £1,080 per annum.

The value of an investment with St. James's Place will be directly linked to the performance of the funds selected and may fall as well as rise. You may get back less than the amount invested.

ONGOING ADVICE CHARGE

We will discuss with you the ongoing advice charges for our services. Our advice is not free.

Details of the charges we make for our advice and how it is paid for are set out in the 'Key facts about our costs and services' document you receive. The cost for our advice is paid for and facilitated out of the overall charges levied on your investment. The advice charges will also be discussed with you and the specific amount charged will be provided on your personalised illustration. If you have any questions regarding this, please do not hesitate to contact us.

GUARANTEED ADVICE

To provide you with added peace of mind and reassurance, St. James's Place guarantees the suitability of the advice given by members of the Partnership when recommending any of the wealth management products and services available from companies in the group, more details of which are set out on the group's website at www.sjp.co.uk/products.

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