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ABOUT OUR SERVICES AND FEES
Equity Release Products

This document forms part of our agreement with you. For your own benefit and protection, you should read this About Our Services and Fees document carefully before signing our Client Agreement. If you do not understand any point, please ask for further information.

1. Whose Products Do We Offer?

☑ We offer lifetime mortgages and home reversion plans from the whole market.

☐ We only offer lifetime mortgages and home reversion plans from a limited number of lenders. Ask us for a list of the lenders we deal with.

☐ We only offer lifetime mortgages or home reversion plans from a single lender.

2. Which Service Will Be Provided To You?

☑ We will advise and make a recommendation for you on lifetime mortgages and home reversion plans after we have assessed your needs.

☐ You will not receive advice or a recommendation from us. We may ask some questions to narrow down the selection of lifetime mortgages and home reversion plans that we will provide details on. You will then need to make your own choice about how to proceed.

All of the above services involve the arranging and bringing about of a contract between you and another party, should you instruct us to proceed with our recommendation.

3. What Will You Have To Pay Us for Our Services

- A fee of £1295 in respect of our advice service. We may also receive commission from the lender / company that provides your Equity Release product.

1. Where the chosen lender pays us commission for introducing you to them for the Equity Release product, we will tell you the amount we will receive.

2. You will receive a key facts illustration when considering a particular lifetime mortgage or home reversion plan which will tell you about any fees relating to it.

Refund of Fees

3. If we charge you a fee and your lifetime mortgage or home reversion plan does not go ahead, you will receive:

- No refund.