

ROGATE CAPITAL

LIMITED



Terms of Business and Service Agreement

This Client Service Agreement is made between Rogate Capital Limited and:

Client Name(s): _____

I /we acknowledge receipt of Rogate Capital's Terms of Business and Service Charter (last updated June 2023).

I/we confirm that I/we have been given enough time and opportunity to read this document and ask questions.

Regarding Rogate Capital Limited's ongoing services, I/we confirm the following (please select one option):

I/we do not require any ongoing services.

I/we wish to proceed with the Core Service.

I/we wish to proceed with the Enhanced Service.

I/we wish to proceed with the Premier Service.

I/we understand that I/we may only rely on advice provided by Rogate Capital Limited in writing and, to avoid confusion or dispute, should not rely on any verbal communication unless and until it is confirmed in writing.

I/we understand that I/we will be issued with an individual engagement letter and fee agreement before Rogate Capital Limited carries out any chargeable work on my/our behalf. Separate engagement letters and fee agreements will be issued in respect of initial services and fees, and ongoing services and fees.

Duly authorised to sign for and on behalf of **Rogate Capital Limited**

R.T. Bell.

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Date/...../.....

Financial Planner's name: Richard Powell

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Date/...../.....

Client's name

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Date/...../.....

Client's name