

Office use only

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Adviser Initials:	
Date returned:	
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COMPENSATION CLAIMS FEE AGREEMENT

This Fee agreement covers our help to you in raising a complaint about bad financial products or advice you have received.

Please tick each section.

I understand I can complain for free directly to the firm I believe mis-sold a product to me, or to the Financial Services Compensation Scheme (FSCS) if the advice firm has failed. I understand if I am not satisfied with the outcome from the firm that I can refer to the Financial Ombudsman Service (FOS) at no cost. I prefer Philip J Milton & Company to manage my complaint because:-

I understand I can cancel this agreement within fourteen days and with no cost.

I understand any fees are not likely to be paid by the errant firm or the FSCS. This will reduce any redress.

I understand I may cancel this agreement in writing at any time though I am liable for costs till then.

The Company won't accept any redress offer or refer me to the FOS before asking me

I understand this is a service under the Financial Services and Markets Act 2000 and Compensation Act 2006. If I am unhappy with it, I can complain. (Full details of the complaints' procedure are available upon request)

I understand I can seek alternative advice subject to any time limits for claims.

I have read the information provided in the claims' management assistance leaflet.

I understand if I owe anything to the claimant or am declared bankrupt, compensation may be offset against that.

I understand that if redress is directed into a pension for example, I must pay separate fees for your advisory help.

I agree for you to share my details with the FOS and the FSCS as necessary.

Scope of chargeable Advice is as follows;

Expenses and Fees - Guidelines

The time-costed charges for the different staff involved depends on the expertise required. Latest details are available on request and this will be subject to a minimum of £375, whether successful or not. VAT is applicable.

Alternatively, we offer another charging option with a minimum fee of £600 plus VAT. However, the fee is only charged to you if we are successful.

Please confirm your preference by ticking one of the boxes above.

Duration of Fee Agreement

This fee agreement stands until the complaint has been closed or the agreement cancelled in writing. If the agreement ends while we are providing services to you, our invoice will still be due to that point.

If we have given you cost estimates and billing reaches that level, we shall seek permission to continue before incurring further significant cost.

Otherwise, we can continue work and you acknowledge that charges are then likely to exceed our estimates. Please tick this box if you wish to proceed on that basis.

Periodic Changes to terms

Our charging terms are reviewable from time to time. At least fourteen days' notice are given of any change. It may not be possible to estimate the total time cost involved without reviewing relevant details first. If the complaint requires referral to the FOS or the FSCS, the cost is likely to be higher but that will be reflected in our estimate.

The contract sets out the legal relationship between us and is subject to the Law of England and Wales. All correspondence will be in English.

Please return one copy of this document to the Company. The second is for you to keep.

Signature:

Full Name:

Signature:

Full Name:

Date

For Philip J Milton & Company Plc



Date:

Head Office: Choweree House, 21 Boutport Street, Barnstaple, Devon, EX31
1RP Tel: (01271) 344300 Fax: (01271) 342810

E-mail address - info@miltonpj.net Website - www.miltonpj.net

Philip J Milton & Company Plc is authorised and regulated by the Financial Conduct Authority in respect of regulated claims management activities, reference 181768