



GENERAL INSTRUCTION FORM

Client 1

Title

Full name

Address

Tel.

Postcode

Client 2

Title

Full name

Address

Tel.

Postcode

Instructions

Please include copies of any relevant Trusts or other documentation.

DATA PROTECTION STATEMENT

Solidus IEP Ltd (“**Solidus**”) is totally committed to full compliance with the requirements of the General Data Protection Regulations (“**GDPR**”) and the Data Protection Act and will follow procedures which aim to ensure that all employees and legal and professional partners, who have access to any personal data held by or on behalf of Solidus, are fully aware of and abide by their duties under GDPR.

Solidus, in respect of its business purpose, needs to collect and use information from Licensees and their referred clients in order to operate and carry out its function as Will and Trust authors. This information is handled and dealt with properly however it is collected, recorded and used and whether it is held on paper or within computer data records.

CLIENT AUTHORISATION

I/We hereby instruct Solidus to draft the relevant documentation. I/We acknowledge that Solidus will instruct their legal partners to review the drafted documentation. I/We agree to pay the costs even if I/we fail to complete the planning.

For the purpose of compliance with the Data Protection Laws, I/we consent to Solidus holding our personal details, together with those of our trustees and beneficiaries. These details will only be used by Solidus for the purpose of this planning and will never be sold to or shared with third parties for purpose of marketing.

Following the completion of this planning I/we authorise Solidus or their legal partners to contact us directly if there is a requirement which we or the trustees need to be made aware of.

Print Name

Signature

Date

Print Name

Signature

Date

ADVISER'S CONFIRMATION

As the Financial Adviser to the above Client(s) I understand that I am responsible for the advice, signing and witnessing of the documentation.

I agree to all aspects of the planning being reviewed by Solidus' legal partners if required.

Please prepare the documentation under existing law and I accept Solidus' Terms of Engagement which are available in the Licensee area of their Website.

Sending this application form via email, with or without signature, also constitutes my agreement to the above terms.

Print Name

Signature

Date