



## One Page Summary Document Of Our Services

1. We provide a claims management service that specialises in financial services claims relating to pensions or investments. Our service includes telling you whether or not we believe that you may have a valid claim, after we have studied evidence presented by you, or obtained by us, using your permission.
2. We will ask you to locate all the evidence that you can in relation to what happened at the time of the financial advice, and since then. We will then pursue the claim upon your behalf.
3. We will keep you updated with the progress of your claim with regular emails or calls – whichever you tell us you would prefer. You can also call us, free, at any time on 0800 254 5066.
4. We will charge a fee for our service, which is currently 20% (inclusive of VAT) of an award that we win for you. For example;
  - a) If your total gross award is £1,000, the fee will be our minimum £750 (inclusive of VAT)\*
  - b) If your total gross award is £3,000, the fee will be our minimum £750 (inclusive of VAT)\*
  - c) If your total gross award is £10,000, the fee will be £2,000 (inclusive of VAT)\*.Please note that these are examples of how our fees would work, but are not an indication of the actual award level that we may win for you.
5. If we do not win an offer of compensation for you that we have advised you to accept, we will not charge you a fee. Please also note that you can make a claim directly yourself rather than choosing to use a claims management company such as ourselves. For example: you can make a claim directly to the advice firm involved; if they reject your claim you can make a claim via the Financial Ombudsman Service (FOS); if the advice firm has ceased to trade, you may be able to make a claim via the Financial Services Compensation Scheme (FSCS).
6. Please also note that we will send you an invoice for our fee once you have been sent cleared funds in respect of your compensation award.
7. We will act with diligence to ensure that we only make a valid claim upon your behalf, and we expect you to be truthful in your presentation of relevant information to us.
8. You can contact our Partners, Gary Naylor or Ken Hanning, directly via their email addresses; [gary@assist.claims](mailto:gary@assist.claims) or [ken@assist.claims](mailto:ken@assist.claims) .
9. \* **Our average award is £31,186, this would incur a fee of £6,237 (inclusive of VAT)**