

Elevate client re-pricing agreement

You can use this form to move your Elevate client to our latest Elevate Portfolio charging structure, if that is your recommendation after reviewing their circumstances and explaining to them the implications of the move. Details of the charges your clients currently pay are available in the 'Your guide to charges' and through Elevate in their Charges information documents

Using this form

Before we can move your client over to our new charging structure, we need you to complete this form and return it to us so we can make the necessary changes to our records. Please note that until we have received the completed form and updated our records, the current charging structure will continue to apply.

Please complete this agreement using **BLOCK CAPITALS** (excluding email address) and **black ink**.

This form can be used for individual, joint, trust or third party Elevate accounts.

Account details

Client name/account name:	
Elevate account number	E L <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Adviser Declaration (to be completed by the adviser)

I confirm that I:

- have reviewed my client's circumstances
- have provided them with details of the new charges that will apply to their account and explained their implications
- have recommended that they move to the new charging structure
- am aware that they are unable to move back to the old structure even if they are not better priced at all account values

Your full name:	
Your company name:	

Signature

Date

 / /

**For financial adviser use only.
It should not be distributed to,
or relied upon by, retail clients.**

Next steps

Please return the **signed original version of this form** to the following address:

Elevate

PO Box 6877

Basingstoke

RG24 4RT

If you have any questions please don't hesitate to call us on 0345 600 2399.

Elevate Portfolio Services Limited trades as Elevate and is part of Standard Life Aberdeen Group.

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Standard Life Savings Limited is registered in Scotland (SC180203) at 1 George Street, Edinburgh, EH2 2LL and authorised and regulated by the Financial Conduct Authority. www.elevateplatform.co.uk

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