



**Items to bring to your first meeting:**

- ✓ Copy of Passport/Driving Licence
- ✓ Recent utility bill
- ✓ Copies of three months bank statements
- ✓ Copies of recent pension benefit statements
- ✓ Copy of recent mortgage statement
- ✓ List of existing investments, Policies with brief details
- ✓ Completed Risk Assessment
- ✓ Completed Client Information form

*Authorised and Regulated by the  
Financial Services Authority*



FINANCIAL SERVICES

(0117) 9290456

[appointment@nichollstevens.com](mailto:appointment@nichollstevens.com)

## **FIRST MEETING WITH NICHOLLS STEVENS**

- **What to expect and what to bring** -

- **Up to 20 minutes general financial discussion with an adviser to establish your needs and to explain our services. This is at our expense.**
- **If you wish to proceed to FULL ADVICE you will be charged at a rate of £100 per hour. This part of the meeting would not normally take more than 30 minutes resulting in a charge of £50.**
- **If we proceed to give you a full recommendation we will give you the option of paying by commission or fee and this will be explained fully to you.**

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