

## Terms and Conditions

1. Core Financial Paraplanning Limited (also known as CFPL) is the trading name of Chana Wynick (also known as Hannah Wynick), carrying on business as an Outsourced Paraplanning Firm.
2. Core Financial Paraplanning Limited will undertake all tasks, research, and such reports as are required of them by the Financial Advisers to whom their services are contracted.
3. All work undertaken by Core Financial Paraplanning Limited shall be in the strictest confidence and done without giving advice to the end client.
4. All research undertaken by Core Financial Paraplanning Limited will be based upon the information provided to them by the Adviser. The Adviser shall ensure that all relevant and correct information is provided to Core Financial Paraplanning Limited at the commencement of each case and immediately inform them of any changes of such information as soon as the same becomes known to the Adviser.
5. Costs per case and timescales will be confirmed with the Adviser by Core Financial Paraplanning Limited prior to undertaking any work. Standard turnaround times are 8 working days and 4 working days for express cases (for which additional charges apply).
6. Core Financial Paraplanning Limited will accept no responsibility for research or reports which are based upon incorrect information provided by the Adviser.
7. Core Financial Paraplanning Limited will liaise and discuss with the Adviser throughout its preparation of the research and reports. Core Financial Paraplanning Limited accepts no responsibility whatsoever for the advice provided by the Adviser to their Client.
8. Upon the completion of each case, all documentation pertaining to the relevant case shall be returned to the Adviser.
9. All work will be billed at the end of each month and is payable by the 10th day of the following month irrespective of whether or not the Adviser has been paid by their client. Any payments which are overdue by this date or more will incur an additional charge of £100.00.
10. Core Financial Paraplanning Limited have the right to refuse a case if the outcome is deemed unethical or poor practice.



### Office

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### Main Office

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### Email

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