
Client Agreement for Discretionary Management Services

Our Agreement

This client agreement should be read in conjunction with the Terms and Conditions for Discretionary Portfolio Management, the Terms & Conditions for Maia Asset Management Discretionary Portfolio Management Services utilising AJ Bell Custody Services documents and any other documents as listed in our Terms and Conditions. For your own benefit and protection, you should read these terms carefully before signing them. If you do not understand any point please ask for further information.

By signing this Agreement, you confirm that you accept these Terms and will be bound by this Agreement.

Client Details

Account name	<input type="text"/>
Primary Contact Address	<input type="text"/> <input type="text"/> <input type="text"/>
Primary Contact Telephone number	<input type="text"/>
Primary Contact Email Address	<input type="text"/>
MAIA Asset Management Investment Solution	<input type="text"/>

Customer Declaration

I/We confirm that I/we have read and understood the provisions of the Agreement including the Terms and Conditions for Discretionary Portfolio Management, the Terms & Conditions for Maia Asset Management Discretionary Portfolio Management Services utilising AJ Bell Custody Services and other documents referred to in the first paragraph of this client agreement and agree to be bound by the terms set out in all of these documents.

I/We consent to you obtaining, processing, verifying and retaining all personal information (data) contained in or derived from:

- a. This client agreement
- b. Any file notes or recording that you may make following any telephone conversation or meeting that we may have had with you, or any nominated person on our behalf

Signed:	Print Name:	Date:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

In the case of joint accounts this client agreement must be signed by all parties. The account will be operated on the instruction of any one signatory unless specified differently.