



INSTRUCTIONS FROM PRIVATE CLIENTS: ENGAGEMENT PROTOCOL

I may be formally instructed by way of a letter of Engagement.

Once we have agreed the nature of an assignment (which may be a one off matter or an ongoing matter) I will prepare a formal letter of instruction for your approval. The letter should be read in conjunction with my standard terms and conditions which form part of our agreement.

Once you have agreed the contents of the letter and returned a signed and dated copy I will commence work on your behalf.

In agreeing the letter of instruction you are undertaking to provide me with any necessary information to enable me to effectively undertake the assignment.

Stephen Parnham CTA ATT TEP DipPFS