

Terms of Service for Beyond Paraplanning & Intelligent Adviser Solutions

Effective Date: June 2025

These Terms of Service ("Agreement") govern the use of services provided by Beyond Paraplanning & Intelligent Adviser Solutions ("Beyond," "we," "us," or "our") to you ("Client" or "you"). By engaging with Beyond's services, you agree to the following terms.

1. Services Provided

Beyond offers paraplanning, operational consultancy, and strategic support to financial advisers and firms. The specific services include, but are not limited to:

- Report Writing (Annual Review Reports, Suitability Letters)
- Systems & Operations Projects (CRM, MI reporting, process documentation)
- Strategic Support (business process auditing, scaling advice operations)
- Custom Templates & Tools (Word/Excel templates, flowcharts)
- Beyond Partner Tier (monthly/quarterly packages for ongoing support)

2. Service Fees and Payment Terms

- Hourly Rates: Services outside of any pre-defined package are billed at £54 per hour unless otherwise agreed in writing.
- Project-Based Fees: Where services are billed on a per-project basis, a written quote and acceptance from the client is required before work begins.
- Beyond Partner Tier: The monthly fee for the Beyond Partner Tier is £2,000 per month (or £6,000 per quarter), which includes a specified number of suitability letters, review reports, and access to additional strategic support.

Payment Schedule

- Payments are due monthly in advance unless otherwise agreed.
- Payments can be made via bank transfer or other methods as agreed by both parties.

Late Payments

- A late fee of 2% per month will be applied to invoices unpaid after 14 days.

3. Confidentiality and Data Protection

- Confidentiality: Beyond acknowledges that we may have access to confidential or proprietary information in the course of providing services. We agree not to disclose such information without your consent, unless required by law.
- Data Protection: We comply with applicable data protection laws, including the GDPR. As a paraplanning service, we primarily handle adviser-level data, and we do not hold personal client data unless it is provided to us as part of report generation. We will take appropriate steps to ensure that your data is processed securely.

For further details, refer to our Privacy Policy.

4. Client Responsibilities

- **Accurate Information:** The Client is responsible for providing accurate, complete, and timely information necessary for the successful delivery of services. Any delays or issues arising from inaccurate or incomplete information may result in additional fees or delayed timelines.
- **Communication:** The Client agrees to provide feedback, approve work, and respond to communication in a timely manner to avoid delays.
- **Intellectual Property:** All intellectual property rights in any materials, templates, tools, or processes created by Beyond in the course of providing services shall remain the property of Beyond unless otherwise agreed in writing.

5. Limitation of Liability

- **Limitation of Liability:** Beyond's liability for any claim related to this Agreement is limited to the total fees paid by the Client for the service directly giving rise to the claim.
- **No Guarantee:** Beyond does not guarantee any specific outcomes or results as a result of the services provided, and will not be held liable for any failure to achieve business objectives.

6. Termination of Services

- **Termination by Client:** The Client may terminate services at any time with 30 days' written notice. Upon termination, any outstanding payments for services rendered will be due immediately.
- **Termination by Beyond:** Beyond may terminate services if the Client breaches the terms of this Agreement, fails to make timely payments, or if continuing the relationship becomes unfeasible. Beyond will provide 30 days' written notice in such cases.

7. Governing Law and Dispute Resolution

- This Agreement shall be governed by and construed in accordance with the laws of England and Wales.
- Any disputes arising from or related to this Agreement shall be resolved through mediation or arbitration before pursuing any legal action.

8. Miscellaneous

- **Entire Agreement:** This Agreement constitutes the entire understanding between the parties and supersedes all prior agreements or understandings.
- **Modifications:** Any modifications to this Agreement must be made in writing and agreed upon by both parties.
- **Severability:** If any provision of this Agreement is deemed invalid or unenforceable, the remaining provisions shall continue in full force and effect.

By engaging Beyond's services, the Client acknowledges and agrees to the terms outlined in this Agreement.

Beyond Paraplanning & Intelligent Adviser Solutions

Website: www.beyondparaplanning.co.uk

Email: hello@beyondparaplanning.co.uk