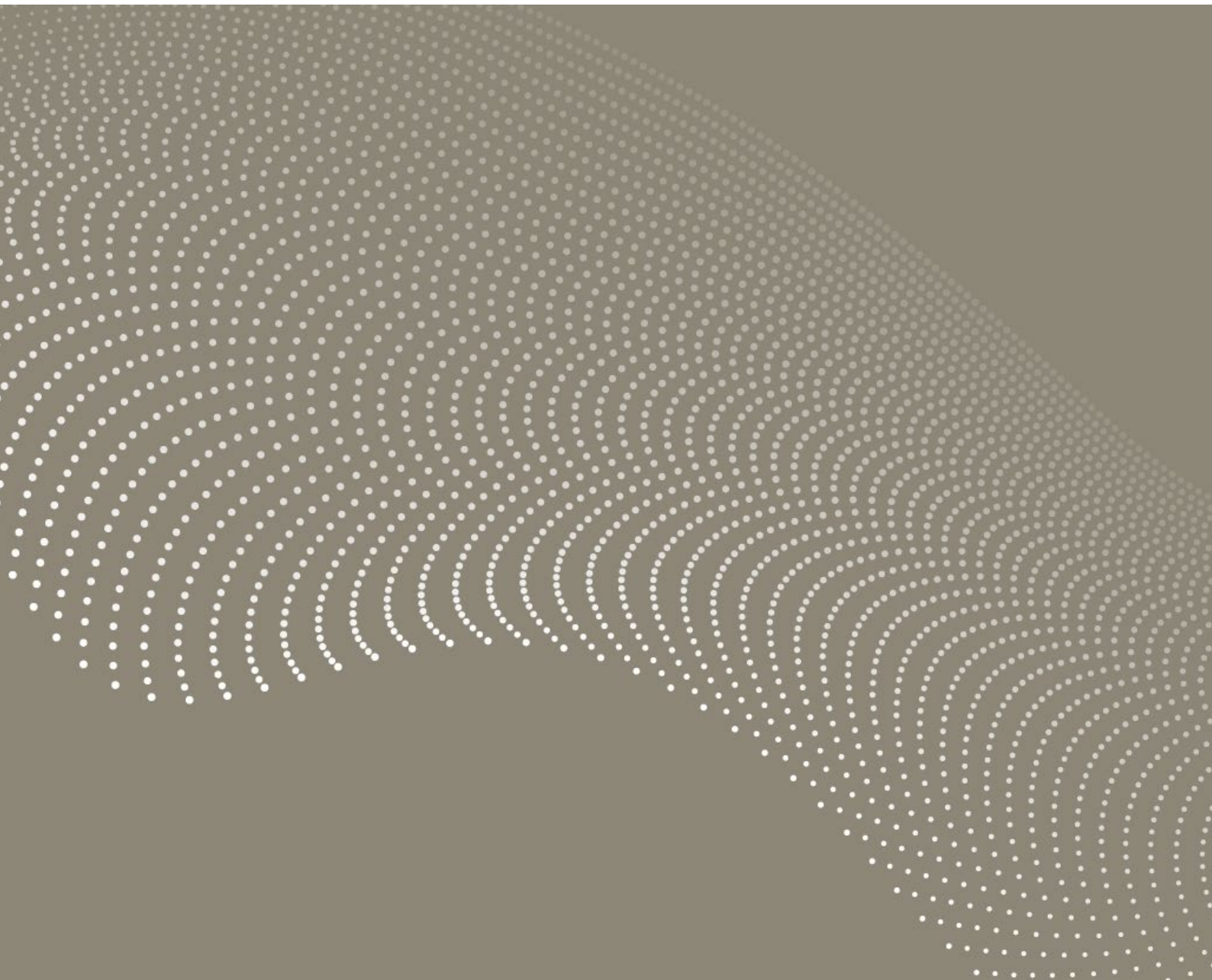




**Circadian**

## **Business Administration Services**

Release Date: **31 March 2026**



## Services

This Service Schedule forms part of the agreement between Circadian and Financial Planner Firm.

Circadian will use its reasonable endeavours to ensure that the agreed service standards, above, are exceeded in the normal course of its business.

Services	
Add new clients	Update all client details
Add new plans	Add new fees
Add top ups	Update Factfind
Create service cases and link associated plans and fees	Maintain accurate file notes
Add documents and/or document links to client records	Create and manage tasks as required
Produce management information (MI) reports	Generate and download factfind documents
Conduct SmartSearch (or equivalent AML) checks	Carry out provider-related work and illustrations

## Service Standards

All work will be completed in a timely and professional manner, in line with agreed priorities and business requirements.

Tasks will be actioned within reasonable timescales as agreed between both parties.

The Service Provider will maintain accuracy and completeness of all data entered into the back-office system.

## Communication & Support

Ongoing communication will be maintained to ensure clarity of requirements and priorities. Any queries or clarifications will be responded to promptly within agreed working hours.

## Review

Service delivery and pricing will be reviewed periodically to ensure continued efficiency, accuracy, and value.

## Charges

The above Services shall be provided, for the first 3 months, in consideration of a variable monthly fee, charged at an hourly rate of **£42.00 (+VAT)**.

The following 12 months will be charged at a fixed monthly fee, calculated as an average of the first 3 months' charges.



If you require any further guidance with the information in this document, please contact using the details below:

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