



FINANCIAL TECHNOLOGY RESEARCH CENTRE

# FTRC Insight Report—Order Form

We confirm we wish to order the following Insight report:

Report	Monthly Subscription* (includes updates)
<b>UK Adviser Software Market Assessment report</b>	<input type="checkbox"/> £3,000 (joining fee) + £500pm (monthly updates)
<b>Half day workshop to review report and identify priorities for relationships with Adviser Software providers</b>	<input type="checkbox"/> £2,750 (meeting in London or via video conference – please contact us for onsite pricing)

Initial reports and monthly updates will be supplied as personally watermarked PDF documents. All prices are subject to VAT at standard rate.

\* The monthly subscription basis operates on an initial payment one of payment and an ongoing subscription of £500 plus VAT per month (minimum period 11 months—notice period 3 months).

INVOICE DETAILS	
Contact Name:	
Invoice Address:	
Purchase Order Number (if needed):	
Contact Email Address:	
Contact Telephone Number:	



Signed on behalf of [organisation]: \_\_\_\_\_

Signature : \_\_\_\_\_ Print Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_ 20\_\_

Please return completed form by email to [samantha.smith@ftrc.co.uk](mailto:samantha.smith@ftrc.co.uk)

FTRC are to provide the latest version of our UK Adviser Software Insights report plus a minimum of eleven monthly updates to this report. The report provides an overview of the UK adviser software market and is updated monthly to reflect recent developments.

**In purchasing the report indicated overleaf we accept the following:**

1. The report will be prepared by FTRC in good faith using our market experience and understanding. It will represent our view of the market however we cannot accept any responsibility for the date or other information included. FTRC cannot accept any liability or be responsive for any decision taken based on the content of the report or related discussions.
2. The research report and monthly updates will be supplied as a personally watermarked digital files (PDF) and we undertake to treat the contents as confidential.
3. We will provide FTRC with a list of any individuals within our organisation who require copies of the initial report and updates.
4. \_\_\_\_\_ *[insert name of organisation]* agree that in purchasing this report it will be used solely for internal use and will not be distributed outside of our organisation.
5. No part of the report may be extracted and used in any third party collateral without the prior written agreement of FTRC. If use of the report contents in this manner is agreed it will only be for limited extracts.
6. Invoiced will be issued monthly and are payable within 14 days.
7. Where the company is using external advisers/consultants/contractors and wishes to share elements of the FTRC research with such advisers the company agrees to obtain a specific undertaking from such advisers/consultants/contractors that they will not use the FTRC reports for any other purpose than the work being carried out for \_\_\_\_\_ *[insert name of organisation]* and that the external advisers/consultants/contractors will destroy/delete any copies of the F&TRC reports after use.
7. Any unauthorised distribution renders the distributor liable for the cost of the document distributed for each third party they are passed on to.
8. Upon signing this order form you are committing to subscribe to the Insight report for a minimum period of 12 months. To terminate this arrangement you must supply 3 months notice in writing.
9. This agreement is governed by the laws of England and Wales and is subject to the exclusive jurisdiction of the English Courts.

---

Signed on behalf of [organisation]: \_\_\_\_\_

Signature : \_\_\_\_\_

Print Name: \_\_\_\_\_

Position: \_\_\_\_\_

Date: \_\_\_\_\_ 20\_\_\_\_\_