

**Comparison map**

**Asset Accumulation**

This comparison card contains information about our financial services. If you collect multiple equation cards, you can compare financial service providers. By conducting intake interviews with various financial service providers, you can determine which one suits you best.

*What can this financial service provider do for you?*

|   |   |
|---|---|
|   |   |
| <p><b>Giving advice and arranging a contract.</b></p> <p>We look at your personal situation then we advise which Asset Accumulation Product is suitable for you. We also make sure your contract can be closed.</p> | V |
| <p><b>Arrange contract only</b></p> <p>You choose a mortgage/insurance yourself. We also make sure your contract can be closed.</p>   | X |
| <p><b>Only advice</b></p>   | X |

|  |  |
|--|--|
| <p>We look at your personal situation, then we advise you on which Asset Accumulation Product is suitable for you.</p> |  |
|--|--|

Curious about what kind of asset accumulation products this financial service provider offers? The services offered by these financial services are:

- Savings insurance.
- Annuity.
- Investment Institution or ICBE.
- Investment object

Want to know what to look for when choosing a financial service provider? View on [www.wijzeringeldzaken.nl/vergelijkingskaart](http://www.wijzeringeldzaken.nl/vergelijkingskaart) .

This comparison card contains information that the financial service provider must give you on the basis of the law. This comparison map was compiled on May 17, 2023.

## Comparison map

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*How can you get advice from this financial service provider?*

You can get advice in multiple ways. The dark blue icons indicate what is possible with this financial service provider, combinations are also possible. The way of giving advice can have an influence on the costs. Ask the financial service provider about the differences in costs.

- At our office
- At your home
- Video meeting
- Telephone meeting
- Online

*Does this financial service provider provide independent advice?*

Independent advice on products must meet two conditions.

- Condition 1: Compare Asset Accumulation Product.
  - This financial service provider meets the condition of comparing enough Asset Accumulation Products.
- Condition 2: Mortgages are not exclusively offered from affiliated providers.
  - This financial service provider meets this condition.

*Why should you choose this financial service provider?*

Our office is affiliated with Financieel Zeker. Financieel Zeker is an independent national advisory chain that works together with all relevant banks, insurers and lenders that are active in the Netherlands. In cooperation with Financieel Zeker , we offer you the right solution.

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*What do you pay to this financial service provider?*

You will find average prices here. The average price is the price customers pay in a comparable situation. The more complex your financial situation, the more you usually pay. Your financial service provider informs you about the exact price. Always have agreements recorded, so that you know what the financial service provider is doing for you and how much you pay for it.

|   | Consumer | Entrepreneur | Other |
|---|----------|--------------|-------|
| Giving advice and arranging a contract. | €1500    | €2500        | €     |
| Contract only                           | X        | X            | X     |
| Advice only                             | X        | X            | X     |

*What can this financial service provider do for you in the future?*

Always go back to a financial service provider if your personal situation changes. Due to changes, the mortgage/insurance may no longer suit your situation. For example, because your family situation or income changes, then you may pay too much or run more risk than you want. You can always contact a financial service provider for an orientation meeting. Is there an important change in your mortgage and/or insurance policy? Then the financial service provider or providers will contact you.

### **Does this financial service provider also offer maintenance services?**

For maintenance services you pay an amount via a subscription, fixed rate or an hourly rate.

For more information about other services, please visit the website of your financial institution service provider [www.stephaniafinance.nl](http://www.stephaniafinance.nl).

1. With maintenance services, a financial service provider can work with you to monitor whether there are changes required or an adjustment to your mortgage or insurance policy.