

Service Options

Bespoke Management **(Portfolio value £500,000 or above)**

Ideally suited to those clients who have accumulated wealth and require continued advice and support to manage their affairs.

- ❖ *Unlimited face to face meetings*
- ❖ *At least one Update Review*
- ❖ *Unlimited telephone contact*
- ❖ *Liaison with Other Professionals*

Wealth Management **(Portfolio value £150,000 - £500,000)**

Ideally suited to those clients who are accumulating wealth and whose affairs could over time become more complex.

- ❖ *Up to two face to face meetings*
- ❖ *At least one Update Review*
- ❖ *Unlimited telephone contact*
- ❖ *Liaison with Other Professionals*
- ❖ *File maintenance*

Investment Management **(Portfolio value £50,000 - £149,999)**

Ideally suited to those clients who require a financial plan to increase their wealth but require structured and regular communication.

- ❖ *One face to face meeting*
- ❖ *One Update Review*
- ❖ *Unlimited telephone contact*
- ❖ *Liaison with Other Professionals*
- ❖ *File maintenance*
- ❖ *Newsletter and regular updates*

Financial Solution Service **(Portfolio value up to £49,999)**

Ideally suited to those who require professional assistance in the choice and arrangement of a particular financial product, rather than ongoing financial advice and support.

- ❖ *No face to face meeting*
- ❖ *No formal review service*
- ❖ *Unlimited telephone contact*
- ❖ *Financial Checklist once a year*
- ❖ *Newsletter and regular updates*
- ❖ *File Maintenance*

Universal Service Content for all Service Levels

- ❖ *Independent Financial Advice*
- ❖ *Full data and File Maintenance*
- ❖ *Record keeping and reporting*
- ❖ *Correspondence Management*
- ❖ *Investment Reports and valuations (upon request for Investment Management & Financial Solution Service)*

Our Update Review will include (but not be limited to) covering things such as

- *Personal Review / Family Review*
- *Strategy for the year ahead*
- *Investment Portfolio review*
- *Legislation & Taxation*
- *Optimising Tax efficiency*
- *Retirement planning*
- *Estate Planning*
- *Protection needs*