



Client service charter

Our Mission statement

We take time to understand what is important to You, our client, and work with you to create a Financial Plan which gives you peace of mind now, make informed choices and achieve your future lifestyle dreams. As part of that process, we are committed, as a Company, to support good governance throughout the whole business structure.



Our commitment and promise to you

- We will take the time needed to jointly understand your circumstances, goals and objectives
- We will work together to understand the level of risk that you are comfortable with and need to take
- We will use our extensive knowledge and skillset to achieve targeted planning solutions for you which match your goals, objectives and agreed level of risk
- We will implement the agreed planning solutions on your behalf and keep you updated on their ongoing suitability
- We will act with integrity and understanding
- We will be transparent and fair in our charging
- We will tailor our communications to ensure that they are as clear and concise as possible
- We will be intentional about upholding our service standards
- We will be proactive in meeting with you at least annually to review your overall Plan and your Portfolio performance
- We will review and alter your Plan in line with your changing circumstances and life goals
- We will deliver good outcomes for You, our client
- We will do all that we can to prevent foreseeable harm
- If you wish, we will keep you updated with legislative, market and financial information that may be of relevance or interest to you

What we need from you

- To engage in open and honest partnership with your Financial Planner about your circumstances, goals and objectives
- To meet with your Planner annually to review your Plan and the solutions implemented on your behalf
- To provide your Financial Planner with detailed and accurate information regarding your income, expenditure, attitude to risk, and any new or existing holdings not organised through our Firm, in advance of your annual planning meeting