



Introducing... **The Financial Advice Service**

Ideal for those who...

- Want to take control of their own financial planning
- Want to engage with a professional financial adviser on some elements of their plan
- Require an ongoing review for those elements to map progress
- Have a clear understanding of both the degree of risk and volatility of their agreed investment strategy and are prepared to opt for a self balancing investment approach



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**True Wealth Ltd is an Appointed Representative of
Blueprint Distribution Ltd, which is authorised and
regulated by the Financial Conduct Authority.**

Financial Advice Service

Service Proposition Overview

Advisory service, with attention on analysing specific areas of financial need and implementing a tailored solution for you

What will it cost ?

- Initial Advice and Implementation Cost
- 0.50% of the fund value for Ongoing Service

Core Services

- Annual report including portfolio updates and valuations
- Opportunity to discuss further areas of your Financial Planning
- Investment choices geared to suit your needs
- Client Record Keeping

Added Value Services

- Proactive Annual ISA campaigning
- Trustee Briefing Service
- Complimentary financial review for one family member
- Client newsletter
- Client newsletters
- Wills* & General Insurance Review Service

* Will writing is not regulated by the Financial Services Authority