



TRUEWEALTH
— FINANCIAL MANAGEMENT —

Introducing... **The Financial Management Service**

Ideal for those who...

- Are looking for a holistic approach to financial planning and management encompassing their family, themselves and, where applicable, their business interests
- Are at a stage in life where their priority is to optimise the capital they have been able to accumulate.
- Want to engage with a professional financial adviser to establish clear goals and a viable plan to achieve them
- Require an ongoing review process to map progress and respond to changing circumstances
- Would want their adviser to ensure that the agreed strategy matches the degree of risk and volatility they are prepared to tolerate and provide regular feedback about their investments
- Looking for their financial adviser to pro-actively introduce new ideas and opportunities



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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 Management Service

Service Proposition Overview

This service offers Holistic Planning of your finances, to enable you to optimise your capital, through regular all encompassing reviews of your personal circumstances and needs

What will it cost ?

- Initial Advice and Implementation Cost
- 0.95% of the fund value for Ongoing Service

Core Services

- Up to 2 face to face meetings per year
- Bi-annual Financial Planning reports including portfolio updates & valuations
- Specialist Financial Analysis & Reporting
- Revisiting of attitude towards investment risk and review of portfolio performance
- Client Record Keeping

Added Value Services

- Re-forecasting of Income needs
- Seamless interaction with professional advisers in respect of tax and wills
- Proactive Annual ISA contact
- Trustee Briefing Service
- Complimentary financial review for one family member
- Client newsletter
- Economic updates
- Client newsflashes
- Forecasting and reviews using specialist tools
- Access to in-house specialists
- Wills* & General Insurance Review Service

* Will writing is not regulated by the Financial Services Authority