



## Introducing...

# The Financial Planning Service

Ideal for those who...

- Are looking for a holistic approach to financial planning encompassing their family, themselves and, where applicable, their business interests
- Are at a stage in life where their priority is to build and create wealth whilst protecting their income
- 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
- Are looking for their financial adviser to pro-actively introduce new ideas and opportunities



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## Financial Planning Service

### Service Proposition Overview

This service offers Holistic Planning of your finances, to enable you to create wealth, whilst protecting your income, through regular all encompassing reviews of your personal circumstances and needs

#### What will it cost ?

- Initial Advice and Implementation Cost
- 0.80% of the fund value for Ongoing Service

## Core Services

- One face to face review meeting per year
- Annual Financial Planning report including portfolio updates and valuations
- Specialist Financial Analysis & Reporting
- Revisiting of your attitude towards investment risk and review of portfolio performance
- Client Record Keeping

## Added Value Services

- Dialogue with other 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 newswatches
- Forecasting and reviews using specialist tools
- Access to in-house specialists
- Wills\* & General Insurance Review Service