Advisory:
Individual advice for you

This is an 'advice only' service designed for clients with a specific requirement in mind. Having discussed your needs, we will provide a specific report outlining our advice and the recommended solutions appropriate for your circumstances. We will implement any of our recommendations at your request and ensure that everything is set up to your satisfaction.

How it works

This is an advice only service, which is designed for clients who have an immediate requirement and would probably like us to arrange a particular product or service to fulfil a current need, but who do not want any of the ongoing support provided by our "Optimum" services. Of course, you'll still benefit from our wealth of knowledge and experience across a diverse range of financial areas.

Having discussed your requirements and gathered any necessary information, we'll provide a report outlining our advice and any recommended products or services appropriate for your circumstances. We'll meet with you to explain our recommendations and answer any questions you might have. We call this: Stage 1 – Financial Review & Recommendation.

Following that meeting, you can choose to take our report and arrange any of the recommended products or services yourself. Alternatively, you can ask us to arrange them for you and we'll ensure that everything is set up to your satisfaction. If you prefer us to arrange things for you we call this: Stage 2 – Implementation.

What happens next?

The provision of our report (Stage 1) is subject to a minimum fee to help cover our costs and, if you want us to arrange things for you (Stage 2), there is a further fee to pay when everything has been set up.

At all times (Stage 1 and/or 2), we will explain and agree any fee(s) with you before commencing any work.

In some circumstances (such as providing "Protection" advice only) there may be an option for the insurer to pay us a commission, which could be used to offset your fee. As above, we will explain this in more detail when this is likely to occur and agree any remuneration before commencing any work on your behalf.

In future

Our advisory service is really designed for "one-off" advice and therefore does not include any ongoing service. Please get in touch with us should you wish to arrange a future review.

Important

As our advisory service does not include any ongoing service, we do not check if our initial advice and any product or service arranged for you continues to be suitable for you over time.

Should you require any advice in future, please contact us and we will be more than happy to arrange a new meeting.

Please see "Our Services & Charges Explained" booklet for further details of what's included in each of our services.

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