

Our Commitment to you

Behind the scenes, we work very hard – these are a few of the things we happily do for you if you sign up to our service agreement:

- We monitor the funds within your portfolio
- We write to you to advise you of any recommended changes
- We assist you with any paperwork that needs completing
- We continually assess the market for funds that may be worthy of investment
- We help to arrange your wealth in a tax efficient manner throughout the lifetime of our relationship
- If you need to take money out of your portfolio, we advise you on the most appropriate way to do it and help you with the paperwork
- We liaise with investment companies to ensure your investments run smoothly and are kept up to date
- As part of our commitment to maintaining a high level of professional service, we keep up to date with regulatory, industry and market news
- In the event of death, we will help as much as we can with any administrative burden concerning your portfolio
- We keep secure records of all correspondence relating to your portfolio
- We contact Companies on your behalf if any alterations are required, such as a change of address or changes to income payments
- Our over-riding aim is to look after you and take away the hassle!