



Southernhay Financial Planning Ltd

CUSTOMER SERVICES CHARTER

Choosing the right financial adviser is an important decision to make. Getting good financial advice will make a real difference to achieving your goals. You might want to borrow money to buy a house, put yourself on track for a comfortable retirement or make sure your finances could survive if illness meant you could not work. There are lots of things to think about and we at **Southernhay Financial Planning Ltd** will help you understand and prioritise your financial needs.

We always act in the best interests of our clients. We use research tools to ensure a suitable solution is presented to meet your objectives and we offer on-going lifetime planning solutions, if that is what you require.

We offer a personal service tailored to your circumstances and we offer 3 types of service.

FINANCIAL CONSULTANCY

We provide financial consultancy for business and private clients with complex affairs creating and managing a comprehensive and evolving strategy on a bespoke basis. An ongoing monthly fee is charged for this service and you will benefit from face to face meetings, to review your financial position and to discuss and agree any changes or enhancements that may need to be made, every six months.

FINANCIAL ADVICE

We provide financial advice to make sure you have the right products for your immediate and future needs. There is an annual charge and we will provide a face to face review every 12 months to review and discuss your financial position and agree any changes or enhancements.

FINANCIAL TRANSACTIONS

We will arrange to transact particular financial products at your request and e-mail to you an annual review. There will be no formal review unless you request this from us.

We look forward to agreeing how best we can meet your needs and providing you with solutions to meet your financial needs.