

## How Do We Get Paid? – Cost Of Our Services

- We provide an introductory 30 minute free consultation.
- Initial advice fee - £495. Refundable against the implementation fee if you ask us to proceed.
- This includes initial meeting and recommendations.
- Implementation fee – up to 3% of assets invested.
- Ongoing service fee of 0.78% of assets under management.

## What Do The Fees Cover?

- Provision of a strategy designed to achieve your financial objectives.
- Accurate Implementation (Professional Responsibility).
- The Crocus Wealth Financial Investment service:
  - I. Strategic research and development.
  - II. Investment research.
- Ongoing servicing/suitability.
- A partnership with a quality firm working on your behalf.

## What Is The Process?

- Initial fact finding meeting to establish your current circumstances and discuss your goals and objectives.
- Provide recommendations to achieve your objectives.
- Implementation.
- Access to your adviser to discuss any changes in your personal circumstances or requirements.

