

What Is The Role Of The Adviser?

It is important that when dealing with us, you know what role we play in your planning.

- Clearly understand your goals and aspirations.
- Develop the right strategy to achieve those goals.
- Help you to understand risk and help provide education about investments.
- Develop an appropriate investment strategy with you.
- Implement agreed recommendations.
- Monitor progress toward your objectives.
- Review the strategy regularly.

What We Expect From Our Clients

It is equally important that we believe clients understand what is expected of them in the process.

- Input into the process.
- Telephone calls and e-mails answered promptly.
- Paperwork completed and returned as soon as possible.
- Questions asked if something does not make sense.
- Honest feedback on our service.
- A commitment to working with us going forward.

