Partner Service:

Our Partner Service is most suited to those clients with significant investment portfolios and/or pension funds, who prefer a strategic review every six months.

Clients will typically be concerned about:

1. Their understanding of their present financial position and how to maximise all opportunities.
2. The structure of their existing investments and pensions.
3. The amount of risk they are taking.
4. Ensuring their investments and pensions are invested in the most tax efficient manner.
5. Aiming to maximise income and/or growth from their investments and pension fund.

Included in this service:

- Two meetings with your adviser each year to revisit your financial strategy, complete a financial health check, and reaffirm your attitude to investment risk.
- Your portfolio will be reviewed twice a year. Where your consent has been given your portfolio will also be rebalanced every year as appropriate.
- Once a year a cashflow analysis report will be provided as required, to ensure your needs and aspirations are on track.
- Where relevant to the plans we manage, we will assist you with your tax returns on request.
- We will provide advice in connection with the most tax efficient investments for your circumstances.
- You will have access to your adviser and administration team between scheduled reviews.
- Unrestricted telephone and e-mail access to your adviser team. We aim to return phone calls and respond to e-mails within 24 hours .
- With your authority we can provide information to and liaise with your other professional advisers (for example your solicitor or accountant) in connection with the plans we manage.
- We will provide online access to your portfolio valuations where possible.
- We will assist with any paperwork you have received since the last review that confuses you.
- Periodic newsletters and relevant updates.

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