

## Our Services – What’s Included...

JJFS has been established for 15 years with 40+ years of combined industry experience. We are fully independent and hold Chartered Financial Planner status, the Gold Standard qualification indicating our commitment to deliver the highest standards of professionalism and maintain standards of excellence in qualifications, ethics, business practices and professional development.

Our financial planning services are wide-ranging and as a client of JJFS you benefit from some or all of the following:-



Simon Jackson DipPFS  
Helen Jeffrey Chartered Financial

1. Annual Product Review (performance, features, suitability)
2. Annual review of circumstances and financial objectives
3. Meetings (usually at our offices or on Zoom/MS Teams/telephone)
4. Written summary of review meeting
5. Access to the MyJJFS portal for secure messaging and instant valuations
6. Unlimited email support
7. Unlimited telephone support
8. Cashflow modelling
9. Income/expenses review
10. Assets and liabilities review
11. Fund switches
12. Internal investment transactions (eg portfolio to ISA)
13. Amendments/increases to existing products
14. Fund charting/performance reporting
15. Risk profiling
16. Death Benefit Nomination Form updates
17. Trust updates
18. Maximum funding calculations (pensions)
19. Annual tax table updates
20. Tax planning (year-end reminders, periodic updates)
21. Estate planning
22. Second opinion / sounding board
23. Assistance with online access for valuations/fund and policy information and updates
24. Updates regarding changes in legislation and regulation
25. Planning for family members
26. Referral to other specialists/professionals (eg mortgage, Wills)
27. Liaison with your other professionals (solicitors/accountants)
28. Newsletters
29. Extensive library of factsheets produced exclusively by JJFS
30. Market Commentaries

Further information about our services can be found on our website at [www.jjfsltd.com](http://www.jjfsltd.com)

05/2025