

## Need a little extra support?

One of the corner stones of our customer service and also a requirement by our regulator, the FCA, is to treat our customers fairly. As a small firm, one of our core objectives has always been the provision of a high quality, personal service to each of our clients with fairness and our clients' needs at the heart of what we do.



Helen Jeffrey  
Chartered Financial Planner

### One size does not fit all

Treating our customers fairly includes being aware of any specific needs our clients have and the fact that one size certainly does not fit all. For example, we offer various means of communication including email, letter by post, a secure customer online portal, face to face meetings and phone calls. Please don't hesitate to tell us if you have any particular requirements or preferences in the way we provide our service to you.

### Avoiding jargon

We also recognise that financial terms and explanations can be a bit daunting and complex, and we try to avoid the use of industry terminology and jargon wherever possible. It can still be a lot to take in so please ask if there is anything you don't understand and would like us to clarify.

We keep our documentation as short as possible, using plain English with the key points set out clearly and succinctly, but we can go through your documentation with you and explain any areas you are unsure of. In the case of face to face meetings we are more than happy if you wish to bring somebody with you. We can even stagger our advice over more than one meeting where the advice is more complex.

### Direct access to our team

You will be advised by either Simon or myself and in the provision of our services you have direct access to us so that you maintain one main point of contact for continuity. Our admin team are also available and may be able to help with some of your queries in our absence. One of the team is always available to answer the phone during normal working hours.

### Don't be afraid to ask

Life events happen to all of us and at some point during our lives we may be experiencing challenging circumstances such as illness, bereavement, divorce, redundancy or financial hardship. At such times it's important to recognise that we may need a little extra support in our day to day. We want you to feel confident that you can ask us for specific assistance to help ensure you get the best from our service.

You can also ask us for a second opinion before making financial decisions that are outside of our remit but where we can still provide an informed voice, such as setting up bank accounts and credit cards etc. The ongoing threat of financial scams is an ever-growing problem and we would certainly be keen to give our opinion if you were considering an investment that was not included in our service.

We all know that 'life happens' and we fully understand if you don't wish to discuss the specifics but if you need a little extra support then don't hesitate to let us know.

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