

Financial Planning Service

What is the Financial Planning Service?

The aim of financial planning is to help you fulfil your ambitions. Whatever your goals might be, we can help you protect and grow your wealth. We are here to help you make informed decisions about your financial future. In order to do this your financial adviser will work with you to build a clear and detailed understanding of your current and future financial requirements, your investment needs and your attitude to risk and return.

Our focus continues to be building a long term relationship with you.

The building blocks of the service are that you will continue to receive an annual valuation sent to you by your administrator at The Roberts Partnership. If you have access to the internet you can also access your valuation online via our secure website. You have a dedicated financial adviser and administrator who will be working with you to ensure you receive the best service possible.

To ensure that your financial plan is working for you we provide you with an annual review report. This means that together we review your financial objectives on a regular basis; we can then recommend any alterations that may be necessary.

What is included in the service?

- File Administration
- Portfolio valuation on an annual basis
- Online valuation available
- Annual Review Report
- Meeting available if required
- Dedicated points of contact: Consultant and administrator
- Work with / recommend professional advisers as required
- Any additional services charged separately