



CHOICE SERVICE PROPOSITION

SERVICES	DESCRIPTION
Ongoing meetings	
Telephone update (1 per year)	You will be entitled to hold an annual telephone review meeting with your consultant, during which a review of your circumstances, needs, priorities and investment performance will be done. At your request your consultant can also consider any other financial needs you may have.
Reporting	
Valuation / strategy report (1 per year)	Following your telephone review, at your request your consultant will provide a report confirming the discussions, summarising any findings and outlining any recommendations made. The implementation of such recommendations may be subject to an additional fee.
Investment approach	
Auto Re-balancing	As part of your annual telephone review your consultant will ensure the auto re-balanced funds continue to be aligned to your personal circumstances. This approach will ensure we can keep your ongoing management fees appropriate and affordable.
Contact	
Telephone / email assistance via your Consultant	You will have direct telephone or email access to your consultant at any time during working hours for personal assistance. Where appropriate, your consultant may suggest an ad hoc meeting for more complex queries / needs.
Administration	
Client file retention	Your consultant will keep your file up to date as your circumstances change and will hold it securely at our offices for as long as you remain a client of ours.
Forward provider correspondence	Your consultant will forward any correspondence concerning your investments to ensure you are kept up to date with their performance and current value.