



## PROPOSITION SUMMARY

SERVICES	Choice	Aspire	Preference
<b>On-going meetings</b>			
Telephone update (1 per year)	✓		
Main annual review meeting face to face		✓	✓
Interim 6 monthly meeting face to face			✓
<b>Reporting</b>			
Valuation report (1 per year)	✓	✓	✓
Main review meeting report (1 per year)		✓	✓
Interim review meeting report			✓
<b>Investment approach</b>			
Auto re-balancing (1 per year)	✓		
Re-balancing (1 per year)		✓	
Re-balancing (2 per year)			✓
<b>Contact</b>			
Telephone / email direct access to IFA	✓	✓	✓
Proactive client contact			✓
<b>Administration</b>			
Client file retention	✓	✓	✓
Forward provider correspondence	✓	✓	✓
<b>Professional services</b>			
Liaising with 3rd parties		✓	✓

\* Additional ad hoc meetings & reports are available upon request and are at an additional cost