CLIENT SERVICE PROPOSITION

WHO WE ARE

At Surrey Hills Wealth Management our number one priority is to offer clients the confidence that they're in the best possible financial position for their long-term future. We work with private individuals and trustees, ranging from young professionals to sports people, through to entrepreneurs and those now enjoying their retirement.

WHAT WE DO

We can help you reach your financial goals by offering you the appropriate advice and guidance now, and by ensuring that any plans put in place remain effective in the future, no matter how your circumstances change. This service proposition outlines our wealth management services and expertise which we hope you will find informative. We very much look forward to building a professional and valuable relationship with you.

OUR **WEALTH MANAGEMENT SERVICE**

The wealth management service that we offer to clients comprises of four stages:

1. INITIAL CONSULTATION

This is a face-to-face meeting without cost and obligation to you. We use this meeting to understand what is important to you. Our priority is to ensure that, when you meet us, you feel confident enough to ask us probing questions that will naturally give you piece of mind if we answer these questions sufficiently. We understand it takes years to build trust in any relationship and therefore we want you to be able to tell us whether or not we are suitable for your plans. During this meeting we will discuss your personal, or business, financial needs and objectives, and will collect information relating to your existing financial arrangements. We aim to develop a deep understanding of your personal goals and objectives to ensure we can offer you appropriate solutions that fit your plans perfectly.

2. ANALYSIS AND RESEARCH

Following our initial meeting, if you decide that you would like us to take things further, we will then conduct a comprehensive review of your existing arrangements in line with your stated objectives. It's vital in these meetings that you are as open with us as possible to ensure that we are able to put together a financial strategy that maximises your current financial circumstances. We will also take into consideration the levels of risk that is applicable to you and your financial objective. With this in mind, we will then review whether your existing arrangements are suitable.

3. RECOMMENDATION AND IMPLEMENTATION

Once all of the analysis and research is complete we will meet with you to discuss our recommendations. During this meeting we will make recommendations that we feel support your current and/or future objectives. Some recommendations may address new needs that have arisen through our research, while others aim to develop your existing plans. Once you are happy with our recommendations, we will then take ownership for implementing the areas of advice with which you agree to proceed.

4. ON-GOING REVIEW

This is where we will demonstrate to you that you have made the right decision in deciding to put your trust in us. We aim to build long-term relationships with our clients so that, in time, our clients become advocates of our business. We commit to providing on-going, regular, face-to-face advice to ensure the original plans put in place today are still suitable for your needs in the future.

OUR **ON-GOING RELATIONSHIP** WITH YOU

- We agree with you on the frequency of on-going reviews when you become a client. This may be quarterly, half-yearly or annually, depending on your circumstances.
- We host an annual communication event in which we will communicate the current economic environment and important legislative changes which may affect our clients.
- We invite you to client briefings which we run throughout the year focusing on particular areas of interest for our new and existing clients.
- Client events – we host a range of events targeted towards you. Dependent on your hobbies and interests, you may be invited to one of our client hospitality events which have previously included Henley Regatta and Sandown Park race events.
- A market update sent weekly via email giving you up to date market information which is appropriate to you.
- Online access to your Wealth Account 24 hours per day.
- 'The Investor' - our quarterly magazine which is provided to all of our clients.
- Interviews with the fund managers. A CD recording of our recent fund manager interviews which is sent to clients every six months.
- An annual Budget Report which will be sent to clients within 72 hours of the Chancellor's budget announcements.
- An invitation to provide us with feedback and comment on any areas of service not currently offered which you feel we should include.
- We guarantee that we will be able to meet you on a face-to-face basis within 48 hours, assuming we are in the UK.
- We will only communicate to you on the areas that you have expressed an interest in and promise never to send you any 'junk mail'.
- An Investment Committee report which is written twice a year, and made available to clients explaining the steps taken in our investment approach and the changes made in the previous six months.
- Surrey Hills Wealth Management clients automatically become members of our concierge service. Our concierge service is available for members 7 days per week with services including arranging last minute restaurant reservations, discounted theatre tickets or even planning a last minute trip overseas. For more information, visit our website www.surreyhillswm.co.uk. Please note that this services is separate and distinct to those offered by St. James's Place.

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ST. JAMES'S PLACE
WEALTH MANAGEMENT

05/13