

Armstrong Watson Financial Planning & Wealth Management

Our Ongoing Review Service

We consider it critical for most clients to review their strategy once it has been implemented, to make sure that it remains suitable. We will carry out reviews at least annually and these will be tailored specifically to your requirements.

Our Ongoing Review Service includes a face-to-face review meeting in which we will revisit your objectives, risk outlook and existing arrangements along with a written suitability assessment. We will typically charge an ongoing adviser charge of 0.75% of the funds invested.

Reviews are an opportunity to make any changes that are necessary to ensure that your plans remain on track. This is also the time to review any changes in your personal circumstances and discuss legislative changes that may impact on your previously agreed goals. Any changes will be documented and specific recommendations will be presented and agreed with you in writing before implementation. Should everything remain appropriate, we will also confirm this in writing.



ArmstrongWatson®

Financial Planning & Wealth Management

*Giving you
peace of mind
and time to help
you enjoy your
life to the full*

0808 1445575

www.armstrongwatsonfp.co.uk

What to expect from us

- ➔ You will be invited to a face-to-face meeting with your Financial Planning Consultant, at least on an annual basis
- ➔ We will review your financial position, goals, priorities and objectives
- ➔ Analyse the effectiveness of your current arrangements to ensure they remain suitable and recommend changes where appropriate
- ➔ Update you on any potential issues or changes in legislation that may impact on your plan and goals
- ➔ Where applicable, we'll provide you with a comprehensive valuation of your portfolio, reassess your attitude to investment risk, capacity and tolerance to loss
- ➔ We will write to you to confirm the ongoing suitability of your arrangements
- ➔ Telephone and email access to your Financial Planning Consultant and a timely and professional response
- ➔ Recommendation and liaison with in-house and other professionals where required, to provide a co-ordinated approach to your financial affairs
- ➔ Continued advice on making the most of the available tax reliefs and allowances and efficiently releasing capital and/or income from your portfolio where applicable
- ➔ Regular news articles available on our dedicated Financial Planning Website: www.armstrongwatsonfp.co.uk
- ➔ Access to regular updates, unless you have chosen not to receive them via INSIGHT; our quarterly financial planning and tax publication

Changed your mind?

If you no longer wish to benefit from our ongoing review service it can be cancelled at any time. Should you decide to do so, you will no longer receive further advice or service and without further reviews your plans may no longer meet your needs. We will be happy to provide further advice or a one-off review in the future, but this will be subject to additional fees, payable before work commences. Typically, this is subject to a minimum of £1,000.