INVESTMENT SERVICE LEVELS	Investment Service 	Investment Management Service 	Investment Portfolio Service 
Investments	Investments up to £50,000	Investments/portfolios £50,000 - £150,000	Investments/ portfolios over £150,000
Portfolio Analysis and Recommendations	up to £750	£750- £1500	£1500-£3000
Implementation of recommendation	Up to 3% of initial investment or transfer value (offset analysis fee)		
Transfer of existing assets	Up to 2%		
Annual service charge	0.75% p. a NB We do not charge for fund switches		
Investment style options	Following advice investments may remain unchanged		
	This service is for clients requiring simple straight forward advice.	A focused financial planning service covering specific areas.	A comprehensive financial planning service, designed for clients with complex situations requiring high levels of initial and ongoing planning.
Service standards	You provide us with information on the specific areas where you require financial advice. We produce detailed advice in that area alone, meeting with you to explain our recommendations. We will provide a level of service including annual updates and a review meeting every 2 years with access to our client support team when required.	We will listen to your requirements and create an initial outline proposal covering your circumstances. Together we will create a bespoke financial planning report covering specific areas where you require advice, meeting with you to go through every detail. We then provide an ongoing professional service, including an annual review meeting at our offices, with access to our client support team when required.	We meet with you to discuss your personal circumstances and financial planning, clarifying your existing arrangements and provide a full and detailed report. Together we will create a strategy covering every aspect of your finances including investment and retirement planning, protection needs and tax planning. We then provide an ongoing professional service, including a minimum of two comprehensive reviews each year, at a place of your choice, with access to our client support team when required.
	Once agreed we will implement our recommendations and inform you of progress at every stage.		
	We will keep you informed of latest relevant financial news via our email newsletters.		
	We can offer other financial services but we would have to charge a fee for anything outside the agreed level of service		

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