

Service Propositions

Financial Administration Service

Client Benefits

A straight forward, low cost Client Services proposition that meets your needs and with access to a specialist Financial Planner when requested.

Methodology

Our Financial Administration Service will be provided via online, telephone or post by one of our experienced Administrators. If advice is requested you will be referred to one of our specialist Financial Planners who will explain our service and fee schedule.

Core

- Financial Planning – ‘on call’ basis
- Annual valuations for Investment products
- Annual client portfolio valuation upon request
- Access to client area through Two Six Financial website
- Safe keeping and updating records as informed / requested.

Contact

All client contact will be via website, email, telephone and post

Pricing

Initial Plan	• Available upon request
Ongoing Service	• See Tariff
Additional Advice	• Available upon request

Communications

Two Six Financial will provide relevant communications relating to your existing portfolio and needs.

Financial Planning Service - Level One

Client Benefits

A personal financial plan that reflects your unique circumstances and lifetime goals.

A Financial and Investment approach designed and implemented to meet your financial goals and facilitate your lifestyle choices.

Methodology

Our Level One Financial Planning Service will be provided via periodic face to face meetings with a Planner, and by, telephone, email or post with access to our Client website portal.

Core

- Periodic Client Review meeting.
- Periodic Financial Plan update.
- Investment and pensions valuations upon request and as a minimum every year.
- Annual update to Attitude to Risk.
- Reviewing your investment portfolios periodically.
- Ongoing maintenance of your client file so that all correspondence is recorded and actioned appropriately.
- Unlimited access to our client website portal.

Contact

- Face to face, telephone and email with your Planner

Pricing

Initial Plan	• Minimum £500
Client Servicing and Review	• Minimum £475 per annum
Additional Advice	• Minimum £500

Communications

Two Six Financial will provide relevant communications relating to your existing portfolio and needs.

Financial Planning Service -Level Two

Client Benefits

A personal financial plan that reflects your unique circumstances and lifetime goals.

A Financial and Investment approach designed and implemented to meet your financial goals and facilitate your lifestyle choices.

Methodology

Our Level Two Financial Planning Service will be provided via regular face to face meetings with a Planner and Client Manager, and by telephone, email or post with access to our Client website portal.

Core

- Annual Client Review meeting.
- Annual Financial Plan update.
- Investment and pensions valuations upon request and as a minimum every six months.
- Annual update to Attitude to Risk.
- Reviewing and rebalancing of your investment and pensions portfolios.
- Ongoing maintenance of your client file so that all correspondence is recorded and actioned appropriately.
- Unlimited access to our client website portal.

Contact

- Regular face to face with your Planner

Pricing

Initial Plan and Review	• Minimum £500
Client Servicing and Review	• Minimum £975 per annum
Additional Advice	• Minimum £500

Communications

Two Six Financial will provide relevant communications relating to your existing portfolio and needs.

Financial Planning Service - Level Three

Client Benefits

A personal financial plan that reflects your unique circumstances and lifetime goals.

A Financial and Investment approach designed and implemented to meet your financial goals and facilitate your lifestyle choices.

Methodology

Our Level Three Financial Planning Service will be provided via face to face meetings with your Financial Planner, Client Manager, and other relevant professionals by telephone, email or post at the point of need with access to our Client website portal.

Core

- Minimum of two Client Review meetings per annum.
- Annual Financial Plan update.
- Investment and pensions valuations upon request and a minimum of Quarterly Investment and Pension valuations.
- Annual update to Attitude to Risk.
- Reviewing and rebalancing of your investment and pensions portfolios.
- Access to one hour 'At Our Expense' legal and accountancy consultancy from our recommended professional advisers. Ongoing maintenance of your client file so that all correspondence is recorded and actioned appropriately.
- Unlimited Planner and Client Manager access during office hours.
- Access to your Planner via personal mobile number.
- Unlimited access to our client website portal.

Contact

- Face to face with your Planner at the point of need
- Regular contact with your Planner
- Dedicated Client Manager

Pricing

Initial Plan and Review	• Minimum £500
Client Servicing and Review	• Minimum £2,100 per annum
Additional Services	• Minimum £500

Communications

- You will be proactively advised of new opportunities.
- Invitations to client seminars and events that relate to your circumstances.