



***Your
choice
of
client
service
programme***



There have been some significant and far-reaching changes in the financial services industry, and the way some of these will directly affect you.

One of these changes is that insurance and pension companies have reduced the charges they apply to their policies. This is, of course, good news for investors, but it does mean that they have reduced the commissions they pay to financial advisers.

Another change is that the regulatory burden is increasing, which brings with it increased paperwork and administration.

As a result of the above, financial advisers like ourselves have **less income** but have to do **more administration**. This means it is impossible to provide an appropriate level of service simply by relying on commission.

We have reviewed our business strategy and have decided that, in order to give our clients the level of service they would like to receive and we would like to supply, we should now offer three distinct programmes.

1 – The Gold Client Service Programme (proactive)

2 – The Silver Client Service Programme (annual review programme)

3 – The Bronze Client Service Programme (reactive)

4 – No Service (File closed)

Above all else we seek to give loyalty and the best advice to our clients.

In addition we wish to continue to offer a first class and improving service now and over the years ahead.

We believe that it is in our mutual interest to strengthen and further enhance the relationship which we have and we hope you will share our views.

1 – The Gold Client Service programme (proactive)

This programme is a totally proactive, full financial planning service.

The main features of this programme are:

- There is an initial **Your 'Where am I now' Review** from **£497**
(A review and report of your current circumstances)
- There is a **minimum monthly retainer of £57**
*Or an **annual retainer of £570***
- You will have the opportunity of three monthly reviews at least one face to face, including pre meeting research
- Your annual **'Where am I now' Report**
(A review and report of your current circumstances)
- Your annual **'How do I get there' Report**
(A review, report and a recommended action plan for your wealth creation)
- Your annual **'Protecting what I've got' Report**
(A review, report and action plan for estate planning)
- Monthly E-Magazine
- Printed Newsletter three times a year
- Budget Updates
- Unlimited telephone and e-mail access
- Your file will be kept updated so that we can respond in a timely manner to your requests for service and **proactively advise you**
- Additionally we will keep your file under review and advise you when we feel you should consider any new opportunities that may arise for you
- There will be no additional charge for drawing these opportunities to your attention, although there may be fees or commissions if you decide to act on any recommendations
- Fees will be agreed with you for each service prior to work commencing.

2 – The Silver Client Service Programme (annual review programme)

This programme is for clients who require an ongoing service.

The main features of this programme are:

- There is an initial **Your 'Where am I now' Review** from **£497**
(A review and report of your current circumstances)
- There is a **monthly retainer of £27**
*Or an **annual retainer of £270***
- You will have the opportunity of a face to face annual review, including pre meeting research
- Additional reviews will be available at your request
- Your annual **'Where am I now' Report**
(A review and report of your current circumstances)
- E-Monthly Magazine
- Printed Newsletter three times a year
- Budget Updates
- Unlimited telephone and e-mail access
- Your file will be kept updated so that we can respond in a timely manner to your requests for service
- Fees will be agreed with you for each service prior to work commencing.

3 – The Bronze Client Service Programme (reactive)

This programme is entirely reactive.

It is for clients who do not require ongoing service but want their file maintained and to know we are available should they need us.

The main features of this programme are:

- There is an **annual retainer of £97**
- Printed Newsletter three times a year
- Your file will be kept updated so that we can respond in a timely manner to your requests for service
- Work will only be undertaken at your request
- Fees will be agreed with you for each service prior to work commencing

4 – No Service

You no longer require our services.

You wish your file to be closed, with no further obligation or responsibility to maintain contact or to offer advice or planning or review.

Name			
Address			
Telephone			
Membership level (Tick Box)	Gold	Silver	Bronze No longer required
Membership from			
Membership to			
E-Mail			
Name			
Signed			
Date			

Authorised for and behalf of Grosvenor Beaumont Financial Services Limited
and Grosvenor Beaumont Financial Planning Limited

STANDING ORDER MANDATE

To: _____ Bank PLC

Address: _____

Please pay: Barclays Bank

Sort Code 20-92-54

for the credit of: Grosvenor Beaumont Financial Planning Limited

Account number: 00095737

The sum of £ **497.00** (four hundred and ninety-seven pounds only)
immediately followed by

The sum of £	57.00 (fifty-seven pounds only)
	27.00 (twenty-seven pounds only)
	On the 1 st of each month
	Commencing 1 st until further notice or
The sum of £	570.00 (five hundred and seventy pounds only)
	270.00 (two hundred and seventy pounds only)
	97.00 (ninety-seven pounds only)
	On the 1 st of (month) annually
	Commencing 1 st until further notice

quoting the reference of our/my name(s) and debit my/our account accordingly.

Account to be debited: _____

Account Number: _____

Sort Code: _____

Signature(s): _____

Date: _____