

SERVICE LEVELS

Support Service	Primary	Premium	Premier
Review meetings – including consolidated valuation reports			
Annual assessment and one full review every two years	✓		
One full review per year		✓	
Unlimited – by agreement			✓
Record Keeping			
Remove accumulated junk from your finances	✓	✓	✓
Active administration and record keeping - excluding portfolio management <i>(updated automatically as we receive information)</i>	✓		
Full service administration and record keeping – including portfolio management <i>(We manage the update of your information)</i>		✓	✓
Standards			
Half yearly newsletter – via email	✓	✓	✓
Unlimited telephone and email access	✓	✓	✓
The second opinion service	✓	✓	✓
Strategic Support			
Advice, research and reporting – as requested <i>(some charges may apply)</i>	✓	✓	✓
Family money help and guidance		✓	✓
Annual action plan “What you need to do to reach your goals”		✓	✓
Access to wealth preservation and estate planning services		✓	✓
Dedicated support team		✓	✓
Personal introductions to professional legal and accountancy services		✓	✓
Working with your other professional advisers and helping to manage relationship		✓	✓