HARLEY
FINANCIAL SERVICES LIMITED
live for today, plan for tomorrow

Our service proposition

Initial consultation

- Initial meeting with one of our qualified financial planners
- A chance to ask questions and understand our service
- Opportunity for us to find out what help you require
- Discuss the options available to you from our menu of services
- Information about our charges

Fees for this part of our service - at our expense

Preparation of Financial Analysis and Plan

- Gathering of information about your existing financial arrangements
- Full risk profile completed
- Cashflow Analysis completed if required
- Analysis of your current holdings to see if they match your risk profile
- Recommendation of an asset allocation that matches your risk profile
- Preparation of detailed report outlining our recommendations
- Second meeting to explain and discuss your report in detail

Fees for this part of our service – please see our Terms of Engagement

Implementation

- Handling of all fund and policy administration on your behalf
- Regular updates to keep you informed of progress
- Ensure all your documents are issued in line with your expectations
- Confirmation of all actions taken on your behalf in writing

Fees for this part of our service – please see our Terms of Engagement

Reviews

- Structured reviews to give you peace of mind
- Assessment of your current circumstances and any changes to your plans that are needed
- Regular updates and information regarding your holdings
- A choice of differing levels of support depending on your needs
- Ongoing support with correspondence and administration issues

Fees for this part of our service – please see our Terms of Engagement

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