E·B·S EST.1973

Ongoing Service Provided to You *(we will tell you if VAT is payable in addition to any of the fees noted below)*		Partner	Engaged	Valued Plus	Valued
Your Portfolio Report, providing updated information and valuations of your plans:	Updated 6 monthly or on request	✓	-	-	-
	Updated annually	-	✓	✓	-
	Updated every 2 years	-	-	-	✓
Your Capital Schedule, a one-page summary of your overall net worth:	Updated 6 monthly or on request	✓	-	-	-
	Updated annually	-	✓	✓	-
	Updated every 2 years	-	-	-	✓
Periodic Suitability Assessment of your plans, against your goals and objectives, to ensure they remain on track and suitable.		✓	✓	✓	✓
Reviewing existing plans (e.g. contribution level or investment strategy)		✓	✓	✓	✓
Meeting with your dedicated Chartered Financial Planner - Face 2 Face, Video or Telephone:	Meeting at a UK location of your choice - as and when required	✓	-	-	-
	Meeting at your home or business or online - annually	✓	✓	-	-
	Meeting at our office in Lanark or online - annually	✓	✓	✓	-
	Meeting at our office in Lanark or online – every 2 years	-	-	-	✓
You will be assigned a dedicated point of contact, supporting your Chartered Financial Planner:	Diploma Qualified Paraplanner	✓	✓	-	-
	Client Support Executive	-	-	✓	-
You will receive our quarterly newsletter by email.		✓	✓	✓	✓
Lifestyle Planning: looking at your cashflow from all sources, to assist you with future income planning.		✓	-	-	-
Priority Response Service: which commits us to respond to your queries as a priority.		✓	-	-	-
Discounted initial fees for new advice or top ups to existing investments.		✓	-	-	-
Second Opinion Service: we will discuss any general queries relating to your wider financial arrangements incl. cash deposits.		✓	✓	-	-
Professional Liaison Service: Working with your existing legal and accountancy professionals. We will offer to assist you in appointing an appropriate professional if your circumstances require this.		✓	✓	-	-
Remove the Hassle Service: Where we offer to review your financial records, as requested by you, and offer advice and assistance on what records should be retained.		✓	✓	-	-
Liaising with providers/platforms to manage income or withdrawals from your plans, incl. changes to existing arrangements.		✓	✓	✓	✓
New withdrawal or income request:	From existing investments From existing pensions	✓	✓	£350 £500	£350 £500
Managing the cash positions within your plans (where applicable).		✓	✓	✓	✓