Our 'Older Client' Services Policy

We recognise that an older client's needs are specific and that financial issues can be complicated and daunting. The anxiety caused by this is recognised and we are happy and able to assist with your concerns. We aim to bring you peace of mind by giving practical advice on everyday matters, as well as planning ahead for the future.

Clear Guidance

We will talk you through things step by step so that you fully understand the advice being given. It is important that you have enough time to make a considered decision about advice being provided, so you do not feel pressured into doing something you are not completely happy with.

Home and Care Home Visits

We appreciate that it may not be easy for you to visit us at our offices and so we are happy to visit you in your own home, in a nursing or care home, or hospice.

Accompanied Visits

We are always happy to arrange visits where your family, friends, neighbours, or legal advisers are present. Should you prefer a female to accompany our adviser, it would be easy to arrange for our office manageress to attend. We will respect your desire for privacy and confidentiality.

Information

We will provide you with as much information as you need, always ensuring that this is helpful and relevant. Printed materials can be in large script and the important and key points highlighted. Before implementing our advice or arranging a financial product we will write to you setting out the advice in detail. Copies of our written advice can be provided to your family or other third parties if you request this.

Terms of Business

Your first meeting with us is without any charge or obligation to take matters further. We will explain the basis of our advice and the costs and charges that may apply should you wish to proceed.