



financial advice

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At IQ Financial Advice we strongly believe that professional financial advice and planning can add significant value to individuals and businesses. This belief is the cornerstone of our approach and is reflected in the ongoing services we offer to all of our clients.

As we work with you throughout your life, helping you create a clear plan to prosperity, we focus on what it is in life that you enjoy and are passionate about. In centring our approach around your passions we aim to make a real difference to your life.

IQ Premier

A 6-monthly Review Meeting With Your Adviser:

A Review Of Your Financial Plan
The IQ 12 Point Financial Health Check
Revised Cash Flow Forecast
Updates On Relevant Legislative Changes

Unlimited Access To Your Adviser By Telephone & Email

Unlimited Face To Face Access To Your Adviser Between Review Meetings

Online Access To Your Investment Portfolio

Real Time Valuations
Analyse Current Holdings & Asset Allocation

Quarterly Newsletter:

Financial Topics Of Interest To Your Inbox Every Quarter

Your Professional Network:

Providing A Trusted Connection With Your Accountant & Other Professional Advisers

The Tax Maximiser:

Ensures Full Use Of Available Tax Allowances
Reclaim Any Previously Overpaid Tax
Structures Your Finances Efficiently

The Family Wealth Preservation Service:

Joined Up Planning With Your Children & Grandchildren
Will & Power Of Attorney Review Service

The Keep It Simple Service:

Removing The Hassle From Your Financial Paperwork
Updating Providers To Changes In Your Personal Details

The Second Opinion Service:

Providing You With A Sounding Board For Any New Ideas

Please note: to benefit from IQ Premier we would expect to be your sole financial practitioner.

