



financial advice

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Private Client Service Proposition

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.

The service we can offer you is broken down into four stages as follows:

- An initial consultation
- A review and recommendation process
- An implementation process
- An ongoing review service

Initial consultation

We offer up to 1 hour's complimentary consultation and the purpose of this is to identify your personal needs and objectives, establish what benefits would result from using our services, outline our associated costs and give you the opportunity to appoint us.

Review and recommendation process

This could involve a specific review of particular issues you feel require attention or could involve a complete overview of your entire financial situation.

Implementation process

This process only begins once we have your agreement on the strategy to be put in place. This may involve arranging investments or acquiring products on your behalf or simply implementing a specific financial planning process, such as estate planning.

Ongoing review service

An ongoing review service has always been integral to our business as we believe that it can add significant value to both individuals and businesses. The purpose of this service is to develop our planning strategies over time to take into account your changing circumstances and objectives as well as developments in economic conditions or legislation (taxation etc). It also gives us the opportunity to give you access to new ideas and financial products which we think may be of use to you.

We offer different levels of ongoing service in order to best meet the individual needs of our clients. Although each of our service profiles is available to all clients, our flagship offering, IQ Premier, is best suited to a specific type of client. We would be delighted to talk you through these in more detail to see which best meets your requirements. Please ask for further details.