



**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.

## Financial Advice Service

<b>Access To Your Adviser By Telephone &amp; Email</b>	Limited To A Total Of 6 Hours Per Year
<b>Online Access To Your Investment Portfolio</b>	Real Time Valuations Analyse Current Holdings & Asset Allocation
<b>Annual Portfolio Valuation</b>	Provision Of Summary Of Investment Holdings Ongoing Administration Of Your Client File

## Financial Planning Service

<b>An Annual Review Meeting With Your Adviser:</b>	A Review Of Your Financial Plan The IQ 12 Point Financial Health Check Updates On Relevant Legislative Changes
<b>Access To Your Adviser By Telephone &amp; Email</b>	Limited To A Total Of 6 Hours Per Year
<b>Online Access To Your Investment Portfolio</b>	Real Time Valuations Analyse Current Holdings & Asset Allocation
<b>Quarterly Newsletter:</b>	Financial Topics Of Interest To Your Inbox Every Quarter
<b>The Tax Maximiser:</b>	Ensures Full Use Of Available Tax Allowances Structures Your Finances Efficiently
<b>The Family Wealth Preservation Service:</b>	Joined Up Planning With Your Children & Grandchildren Will & Power Of Attorney Review Service
<b>Your Professional Network:</b>	Providing A Trusted Connection With Your Accountant & Other Professional Advisers

