

PROPOSITION SUMMARY

SERVICES	Reduced	Standard	Enhanced	Premier
Ongoing meetings				
Telephone update (1 per year)	✓			
Main annual review meeting		✓	✓	✓
Interim review meeting (1 per year)				✓
Ad hoc meeting (*additional fee payable)	*	*	*	✓
Reporting				
Access to client portal			✓	✓
Valuation / strategy report (1 per year)	✓	✓	✓	✓
Main review meeting report (1 per year)		✓	✓	✓
Interim review meeting report				✓
Ad hoc report (*additional fee payable)	*	*	*	✓
Investment management				
Auto re-balancing (1 per year)	✓			
Investment adjustments (1 per year)		✓		
Bespoke portfolio management			✓	✓
Contact				
Telephone / email direct access to adviser			✓	✓
Telephone / email assistance via the office	✓	✓		
Enhanced client contact		✓	✓	✓
Administration				
Client file retention & maintenance	✓	✓	✓	✓
Forward provider correspondence	✓	✓	✓	✓
Annual newsletter	✓	✓		
Quarterly newsletter			✓	✓
Professional services				
Liaising with 3rd party professionals			✓	✓
End of tax year service			✓	✓
Bespoke services				
Provision of additional bespoke services*	*	*	*	✓
ANNUAL COST – CORE PACKAGE	£250	£675	£1350	£4275

* Provision of additional bespoke services includes our financial planning service, which involves regular periodic reviews of client objectives measured against income, expenditure and assets. This would normally be covered under a separate service and retainer fee agreement.

'Clayden Associates' is a trading name of Clayden Associates Limited.

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Clayden Associates Limited are registered in England & Wales under number 5396590. Registered Office as above.

Authorised and regulated by the Financial Conduct Authority.