



Customer Charter

We aim to provide a holistic and comprehensive service to both our commercial and private clients.

We are confident that this service will be amongst the best in the financial services industry. We constantly strive to improve the professionalism and qualifications of its members whether they are at the forefront of giving advice, or to our dedicated back office support team.

We can confirm that we adhere as a company to the principles of “Treating Customers Fairly” as prescribed by our regulator the Financial Services Authority.

Our processes and procedures follow the guidelines as laid down by our network, Intrinsic Financial Planning Limited, which is authorised and regulated by the Financial Conduct Authority.

If at any point you are dissatisfied, or you wish to comment on the services we provide, we will attempt to resolve the matter to your complete satisfaction.