
The Talking Finances code and you

Our job is to serve you and we consider this our privilege. You have the right to expect us to treat you fairly, to be transparent in all our dealings with you and to use clear and plain language that is easily understood.

We work as a team and support each other to give our clients the sort of service that we, ourselves, would like to receive. Each member of our team embraces the Talking Finances code as the minimum standard for the services that we give. And, as a local business, we enjoy working closely with other skilled professionals in the area who think the way that we do.

Business, fair and square

- We will be honest and open with you about all aspects of our service, including the fees that apply
- We will keep you informed of any changes to our fees or terms of business and send you regular statements where appropriate
- Your personal information will be treated as private and confidential in our secure and reliable record-keeping systems

Services to meet your needs: it's your choice

- We are not restricted in any way on which products and services we can recommend for you
- We will be happy to carry out one-off transactions on your behalf
- You can ask us to advise you on one or more specific areas of your finances
- We can provide you with a full Financial Planning service

Referrals

- Other local professionals who share our outlook are our colleagues and friends, and we are happy to refer them to you as required because we know they will look after you
- We consider a referral from one of our clients as the ultimate accolade because it means we are delivering fully on the Talking Finances code

Your satisfaction

- We will act quickly and sympathetically if things are not going smoothly and will consider all cases positively, keeping you in the loop throughout
- If we cannot settle a complaint to your satisfaction, you may ask the Financial Ombudsman Service to look into it

Further information can be found on our website, by asking our staff or by visiting our offices