2-4 York Buildings
Cornhill
Bridgwater
Somerset
TA6 3BS

Tel: 01278 439494
Email: office@nexusifa.co.uk

INITIAL FINANCIAL REVIEW

FINANCIAL REVIEW SERVICE

This service is the foundation or entry level for all customers. The financial review service will establish the facts about your current personal, financial and other circumstances and any gaps or needs in your existing arrangements, together with identifying your aims, objectives and aspirations. This information is then used to determine not only why these should be satisfied but how they could be addressed and what order of priority you should set. This service can be accessed as a standalone service without any ongoing service or advice forming part of your agreement with us to act as your agent.

Initial Meeting	
Complete a Personal Financial Planning Questionnaire	✓
Identify and discuss objectives/goals and time frames	✓
Discuss existing plans & investment portfolio in line with objectives	✓
Assess attitude to risk & capacity for and tolerance to loss	✓
Assess financial planning needs and identify financial issues or deficiencies	✓
Client Agreement to retain financial advice service	✓
Post Meeting Analysis	
Financial analysis - identify outline solutions	✓
Research the whole market for suitable products, including the terms of any appropriate financial product	✓
Prepare a recommendation report covering proposed actions	✓
Second Meeting	
Explain and discuss recommendations	✓
Explain fees and charges which may apply and agree in advance	✓
Implement recommendations	✓

For details about ongoing advice and the service options available please ask your adviser, or see our Ongoing Service Levels document.

For more information about typical features of a financial review please see our What Constitutes a Review document.