

Simple Solutions' Client Service Values

- We are committed to providing you with the highest standard of financial advice and service. Your interests are very important to us and for any advice or service we provide we will:
 - be open, honest and transparent in the way we deal with you;
 - not place our interests above yours; and
 - communicate clearly, promptly and without jargon.
- We will advise and make a recommendation for you after we have assessed your needs. We offer advice on limited types of products, or products from one company or a limited number of companies. You may ask us for a list of the products we offer.
- We provide you with an initial consultation free of charge. This helps us to understand your financial objectives and will confirm how we can support you in working towards these. We will also discuss the cost, and level, of our services, both initially and throughout our relationship with you.
- Our financial review and recommendations will be delivered once we have:
 - understood your situation, gathering information about your existing financial arrangements and full personal circumstances;
 - understood your investment knowledge and attitude and tolerance towards investment risk;
 - recommended an asset allocation model that matches your investment risk profile; and
 - analysed and designed your investment strategy.
- Any advice or recommendation that we offer to you will only be given after we have assessed your needs and considered your financial objectives and attitude to any risks that may be involved. We will also take into account any restrictions that you wish to place on the type of products you would be willing to consider.
- We will confirm our recommendations to you in a suitability report along with details of any risks associated with the products recommended.
- Once your strategy is agreed, we will:
 - facilitate and deal with all fund and contract administration on your behalf;
 - communicate regularly, keeping you informed of progress;
 - provide you with all documentation promptly in line with your expectations; and
 - provide you with confirmation of the actions taken on your behalf in writing.