ST. JAMES'S PLACE
WEALTH MANAGEMENT

CLIENT SERVICE CHARTER

EASTERN WEALTH MANAGEMENT

Associate Partner Practice of St. James's Place Wealth Management

PARTNERS IN MANAGING YOUR WEALTH

Low resolution photo, printed photo will be of better quality.

Trevor Taylor FPFS
Chartered Financial Planner
Principal of Eastern Wealth Management
Associate Partner Practice of St. James's Place Wealth Management

OUR ONGOING RELATIONSHIP

We are committed to building and sustaining long-term client relationships based on trust, superior service and the quality of our initial and ongoing advice. Our philosophy is simple: to ensure financial peace of mind for you and your family across the generations. We will provide a highly personalised service, with the aim of 'earning the right' to be considered as your trusted financial adviser for many years to come. We will help you make informed financial decisions to achieve your goals through personal, face-to-face financial advice.

THE TAILORED SERVICE WE PROVIDE TO YOU WILL INCLUDE:

- Face-to-face review meetings
- Availability to speak on the telephone between review meetings to discuss any financial matters important to you as your needs change over time
- Regular financial communications tailored to you and your interests
- Correspondence and literature that is clear and easy to understand
- Clarity and guidance in all aspects of your financial wellbeing

THROUGH OUR REGULAR CLIENT SERVICE REVIEW MEETINGS, WE WILL:

- Understand your financial circumstances and objectives
- Fully review your financial goals and adapt to any changes
- Review and, if applicable, rebalance your investment portfolio and fund choices
- Help you maximise your annual tax allowances
- Keep you up to date with legislation and Budget changes
- Help you to review your appetite for investment risk as your circumstances and priorities evolve, ensuring your investments continue to meet your requirements
- Encourage and listen to your feedback to ensure we maintain our exceptional standards

WORKING TOGETHER, YOU WILL:

- Have a clear understanding of your personal and financial objectives
- Have a plan in place that is risk-adjusted and aligned to your objectives
- Have a proactive process in place to review your financial plan and consider ongoing advice opportunities as your needs change over time

KEEPING YOU INFORMED

We will provide you with access to regular communications. This ensures that you are kept fully informed of how your money is being managed and up to date with all the latest economic information, including any key changes that may affect your financial future. We will agree with you at the outset what you can expect and when.

THE RANGE OF COMMUNICATIONS AVAILABLE TO YOU INCLUDE:

- Online access to your Wealth Account 24 hours a day, via our website
- WeekWatch - a weekly communication covering key market, economic and personal finance news
- Tax year-end reminders of the available allowances and tax-saving opportunities
- Annual valuation reports of your investments

ONGOING ADVICE CHARGE

We will discuss with you the ongoing advice charges for our services. Our advice is not free. Details of the charges we make for our advice and how it is paid for are set out in the 'Key facts about our costs and services' document you receive. The cost for our advice is paid for and facilitated out of the overall charges levied on your investment. The advice charges will also be discussed with you and the specific amount charged will be provided on your personalised illustration. If you have any questions regarding this, please do not hesitate to contact us.

The value of an investment with St. James's Place will be directly linked to the performance of the funds selected and may fall as well as rise. You may get back less than the amount invested.

GUARANTEED ADVICE

To provide you with added peace of mind and reassurance, St. James's Place guarantees the suitability of the advice given by members of the Partnership when recommending any of the wealth management products and services available from companies in the group, more details of which are set out on the group's website at www.sjp.co.uk/products.

Chartered Financial Planner

TREVOR TAYLOR FPFS

Chartered Financial Planner

EASTERN WEALTH MANAGEMENT

Associate Partner Practice of St. James's Place Wealth Management

Eastern Wealth Management Rowan House 36 Bircham Rd
Reepham Norfolk NR10 4NQ

Telephone: 01603 343443 Mobile: 07342 046706
Email: trevor.taylor@sjpp.co.uk
Website: www.easternwealth.co.uk

I hold the prestigious status of Chartered Financial Planner, as awarded by the Chartered Insurance Institute (CII). This is the profession's gold standard for financial planners and bestows confidence in my clients that they are supported by one of the UK's leading wealth management practitioners, wholly committed to providing them with the best possible advice, service and guidance.

ST. JAMES'S PLACE
WEALTH MANAGEMENT

SJPP5733c V4 (12/18)