



**Glamorgan Financial Services Limited**  
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## **Glamorgan Financial Services Ltd – Client Service Level Agreement**

### **Asset Management Service**

The Asset Management Service is an enhanced service designed to keep you up to date with how your investments are performing and also to keep your investments up to date with your change in circumstances and also the rapidly changing Investments market.

We will offer access to ourselves either by e-mail or over the telephone to answer any queries that you may have on the business that has been put into place for you by ourselves, or to answer queries on paperwork that you have received in relation to your business placed with us. We will also distribute to yourselves any paperwork that we receive for you on an on going basis and keep you informed of any major changes to your business affairs placed with ourselves.

On an annual basis we will also undertake a face to face visit which will consist of a review of your investments performance and valuation, a review of your attitude to risk and if necessary adjustments made to your portfolio in relation to a change in your attitude to risk. If any other business is discussed or transacted during this review meeting then this will be classed as additional work and charged in accordance with our Services & Costs Initial Disclosure Document. Your Investments will be kept up to date on an annual basis in accordance with our Glamorgan Financial Investment Process Document which I have presented you with a copy of.

This is an annual review service but in between reviews should you feel a wish to review your financial affairs for any reason or you feel your attitude to risk has changed you should contact us immediately so that we can chat through your change in circumstances and if needed, put into place arrangements to meet. Any further subsequent meetings will be charged in accordance with our Service and Costs initial Disclosure Document.

### **Key Features**

- Access to ourselves to answer product related queries by e-mail or over the telephone. Also to answer any queries that you may have in relation to paperwork that has been received on business transacted with ourselves.
- The Collation and distribution of paperwork that we have received in relation to business that has been transacted with ourselves.
- Annual Face to Face review of Investment Performance, Investments valuation and attitude to Risk
- Investments kept up to date Annually in accordance with our Glamorgan Financial Investment Process Document

**Glamorgan Financial** is a trading name of **Glamorgan Financial Services Limited**  
**Glamorgan Financial Services Limited** is registered in England and Wales NO. 5314356 at the above address  
**Glamorgan Financial Services Limited** is authorised and regulated by the Financial Services Authority