



**Glamorgan Financial Services Limited**  
105a Talbot Road  
Talbot Green  
Pontyclun  
CF72 8AE  
Phone 01443 222255  
Fax.01443 223227  
admin@glamorganfinancial.com  
www.glamorganfinancial.com

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

### **Basic Service Level**

This service level has been designed for those clients who do not require an on-going annual review from us once business has been transacted.

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.

However, this service level is a reactive service agreement which means that there are no ongoing face to face meetings between us and yourself and advice from now on is carried out on a reactive basis. Should you wish to review your financial affairs 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
- Access to ourselves 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.