



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

Wealth Management Service

This is our premier level of service designed for clients with financial circumstances that require more frequent monitoring and investments that require bi-annual reviews in order to be kept 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 your financial affairs, or to answer queries on paperwork that you have in relation to your financial affairs. We will also distribute to yourselves any paperwork that we receive for you on an ongoing basis and keep you informed of any major changes that may affect your financial circumstances

On a half yearly basis we will undertake a face to face visit which will be a review of your investments performance and we will also provide you with an up to date investments valuation. On an annual basis we will conduct a further review meeting. This will consist of a review of your personal circumstances and a review of your attitude to risk. Then if necessary, adjustments will be made to your portfolio in relation to a change in your attitude to risk. We will also provide you with an up to date investments valuation and Investment performance review. 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 a bi-annual 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 any financial 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 your financial affairs.
- The collation and distribution of paperwork that we have received in relation to business that has been transacted with ourselves.
- Bi-annual face to face review of Investment Performance and Investments valuation
- Annual face to face review of personal circumstances 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 N0. 5314356 at the above address
Glamorgan Financial Services Limited is authorised and regulated by the Financial Services Authority