



PRIVATE WEALTH MANAGEMENT

working to make you wealthier

our customer service promise

As a firm of leading wealth management advisers we strive to develop a deep understanding of our clients' financial needs and we are very proud of the level of commitment we make to our clients. We believe that professional relationships need to be based mutually on trust, respect, integrity, support and service.

This charter is more than just a document – it is a guide for you to our standards and the level of service you should expect from us whether you telephone, write, visit in person or contact us through our website.

We look forward to working with you to make you wealthier...

Mark Robinson, Director



Financial solutions for forward thinking people

When you visit us, or we visit you:

- All appointments will be confirmed in writing within two working days of making the appointment.
- A member of our team will greet you within five minutes of your arrival at reception.
- The person you have come to see will meet you within ten minutes of the agreed appointment time.

When you phone us:

- We aim to answer all calls courteously within three rings.
- We will always try to answer your query straight away if we can.
- If we don't know the answer to your question or the person you want is not available, we will take a message and get back to you within one working day.

- If you leave a message on an answerphone (including mobile telephone), we will call you back within one working day.

When you write to us:

- We aim to respond with a full answer as soon as possible, but ideally within two working days of receiving your letter.
- If this is not possible, we will let you know that we have received your letter and try to follow up with an answer within the next five days.
- Whatever happens, we will keep you informed.
- We will write in a clear, concise and easy to understand way. Where jargon is unavoidable, it will be explained.



When you e-mail us:

- We will aim to send a full reply in less than two working days.
- If the matter is urgent, we will respond faster.

When you do business with us:

- We will complete a financial review to ensure that we have a comprehensive understanding of you and your needs.
- On becoming a client we will provide you with a full written report highlighting our recommendations.
- We will explain clearly the information we require, how we work (our processes), giving indications of how long each stage may take and what form of support you should receive. Where we are unable to provide any advice, we will inform you as quickly as possible and let you know why.

Continuing service:

- We will ensure that all our dealings with you are courteous and confidential and that we do our best to meet any commitments that we have made to you.
- We will always work in a professional manner, providing advice or information that is focussed on your best interests.

Suggestion, improvement, compliment:

- We welcome suggestions for improvements.
- We are always seeking ways to improve the quality of our services and your views count. For example, we intend to arrange regular customer surveys and the results of these will help to develop future services.
- Compliments or criticisms are equally welcome.

If we command our wealth,
we shall be rich and free;
if our wealth commands us,
we are poor indeed.

Edmund Burke



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