

ClearView

Financial Consultants

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Our Ongoing Servicing Support

“A tailored relationship designed by you.”

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Things change. Your circumstances may alter over time. Markets certainly will change, as too will the range of available products within the market. We believe that good financial planning is a continual exercise. Ongoing reviews are central to this and ***we recommend that we discuss your plans with you as time passes.*** If you agree that such reviews are wise, then ***you will be in complete control*** over the frequency of them. We offer the following ongoing servicing support options and you are able to alter your initial selection whenever you wish :

Service Level “A”	Quarterly
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- we will obtain **quarterly** investment valuations, recording these into your file.
- **quarterly meetings** with your adviser * at our office**
- cost = **2.0%** of the value of the reviewed investments subject to a **minimum fee of £1,000 pa** (*investments valued at under £50,000 will therefore be charged the minimum fee*)

Service Level “B”	Half Yearly
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- we will obtain **half yearly** investment valuations, recording these into your file.
- **half yearly meetings** with your adviser * at our office**
- cost = **1.0%** of the value of the reviewed investments subject to a **minimum fee of £500 pa** (*investments valued at under £50,000 will therefore be charged the minimum fee*)

Service Level “C”	Yearly
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- we will obtain **yearly** investment valuations, recording these into your file.
- **yearly meetings** with your adviser * at our office**
- cost = **0.5%** of the value of the reviewed investments subject to a **minimum fee of £250 pa** (*investments valued at under £50,000 will therefore be charged the minimum fee*)

Service Level	Valuations obtained & recorded	Meetings with your dedicated adviser *	Fee for evening or home meetings? **	Minimum Annual cost	Fee as % of value
A	Quarterly	Quarterly	Yes	£1,000	2.0%
B	Half Yearly	Half Yearly	Yes	£ 500	1.0 %
C	Yearly	Yearly	Yes	£ 250	0.5 %
On Demand	Not provided	Upon your request	Yes	hourly fee rate £ 150	N/A

* Personal Meetings will be offered to you and if you wish for them to take place, they will be arranged at mutually convenient times.

** Home meetings and/or evening appointments can always be arranged for all of our clients. An additional cost will apply based upon the necessary travelling times.

Our charges reflect the level of service that you have selected. We are committed to TREATING CUSTOMERS FAIRLY and our charging structure reflects this.

The Ongoing Servicing Support fee will be confirmed to you in advance. The fee can either be paid for from the underlying investment(s) if the provider allows this or by a Standing Order from your own bank account, or a combination of the two.