Client Care Process & Charges

West Financial Management Co Ltd
Independent Financial Planners

Pre-Meeting Questionnaire

Sent by Royal mail for you to fill in and return

***Initial Discovery Meeting**

(Fixed Fee)

Summary Report Letter

(Complimentary)

Second Meeting Implementation

(No Charge)

Research & Product Selection

(Fixed Fee)

Client Tracker

New business and servicing
Fixed Fee or Commission
available until 21/12/12

Suitability Report Issued

(No Charge)

Client Care Programme

Gold Silver or Bronze
(Charge)

*Client Care Programme Gold & Silver No Charge