

100% Satisfaction Guarantee

First Meeting – Non Client £127 *

* 100% refund if you are not satisfied with the value and expertise you receive from your meeting experience.

Initial Meeting (1st Meeting)

This meeting is to give you the opportunity to discuss your main objectives highlighted in the Pre Meeting Questionnaire, which you have already completed and returned to us.

This gives each of us the opportunity to decide, without obligation, whether we are able to work together in a life long relationship, to provide advice planning and guidance.

You may just require one off advice. This may be possible, if it is within our area of expertise. If not, we will refer you to our extensive range of professional experts.

At this meeting you will be able to discuss the areas of your investment and financial planning which are of a concern to you. We will share an understanding of what priorities and immediate concerns you have and what the next stage should be to achieve your objectives.

If you decide to take advice, any costs will be fully explained at this meeting.

The reason why we make a charge for this meeting is that it is scheduled for at least one hour, where you get the opportunity to ask questions and get advice from Helen West, who is a highly qualified, experienced Financial Planner.

It is important to us that this meeting is a valuable use of your time. If however you feel that you have not had value for money, you will receive 100% refund.

100% satisfaction guarantee
Priceless piece of mind

First Meeting – If you are an existing client on the Client Care Programme, on the Gold or Silver service, there is no charge.