



How we provide advice

FINANCIAL ADVICE

1 We get to know you

- On the phone or face-to-face (no charge for this discussion)
- Discuss our services
- Decide which services are right for you
- Agree how you will pay us for our advice

2 We identify your needs

- Gather information about you and your existing financial arrangements
- Agree your advice priorities
- Explore your financial needs, goals and aspirations
- Assess your attitude to risk

3 We analyse your situation

- Review the information provided and your current situation
- Carry out research into suitable solutions
- Decide on solutions to meet your needs

4 We prepare and present a recommendation and advice report containing:

- Background information
- Your financial objectives
- Summary of your attitude to risk
- An explanation of our recommendations
- Product information
- Relevant applications

5 We implement the recommendations

- Complete applications
- Carry out money laundering checks
- Submit applications and payment to providers
- Manage through to policy/plan issue

We continue to review your plans

We recommend that your financial plans are regularly reviewed and updated. We offer a range of review services to suit all circumstances. Please see our ongoing Service Summary, or ask your adviser for more details.



There are charges for our services that will be agreed with you before we carry out work on your behalf. Your adviser will discuss and agree how we are to be paid before proceeding.

Contact us

To find out more, contact Ecclesiastical Financial Advisory Service today, on

0800 107 0190

Lines are open 8:30am – 5:30pm Monday to Friday (excluding bank holidays). We may monitor or record calls to improve our service

You can email us at

getadvice@ecclesiastical.com

Or visit us at

www.ecclesiastical.com/getadvice

Other useful contacts

Ecclesiastical home insurance

0345 777 3322

www.ecclesiastical.com/homeinsurance

Ecclesiastical church insurance

0345 777 3322

www.ecclesiastical.com/churchmatters

If you would like this booklet in large print, braille, on audio tape or computer disc please call us on 0800 107 0190. You can also tell us if you would like to always receive literature in another format.



Financial Advisory Services

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