PRIVATE CLIENT

Portfolio Service

As a client of law financial planning *private client portfolio service* we will provide you with a clear service level, regular fund reviews and added benefits:

- **Review meetings** – we will provide a face to face annual review with you once each year if you require. Telephone reviews can also be arranged.
- **Valuation service** – you will receive clear valuation statements twice a year.
- **Portfolio reviews** – the funds in your portfolio will be constantly monitored by independent industry experts with switches made when required. We will review the portfolios twice a year.
- **Newsletters** – we will send you bi-annual newsletters with tax updates and market overviews.
- **Opportunities** – we may contact you if we think new rules, tax allowances or legislation means that we believe there are opportunities that may affect you.
- **Tax deadlines** – we will remind you of ISA rules and dates.
- **Welcome pack** – we will provide you with a full comprehensive report together with important information for your retention.
- The **private client portfolio service** is provided at a charge of 0.95% per annum of the value of your invested funds.

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KEY POINTS
OF THE
PRIVATE CLIENT PORTFOLIO SERVICE

- Consolidation of pension and investment holdings to a central platform
- Expert analysis of funds and portfolio construction
- Constant monitoring and free fund switching
- Annual reviews and six monthly statements
- Rebalancing risk and your objectives
- Use of your IFA whenever your require
- Easy and flexible income payment structure
- ISA switching and reminders of tax benefits and changes
- Discounted fund charges and further large fund discounts
- Online access code to your portfolio on request
- Capital gains reports
- No fixed plan fees