

Our Pricing Philosophy

Your first meeting with us is complimentary and obligation free. We'll use this time to explore your current situation, what you are trying to achieve and why it's important to you.

We believe in ...



Providing fee transparency.

All our fees are set out in writing and mutually agreed upfront. Each year we will send you a written statement detailing the services you've received from us, and how much you've been charged for those services.

You will always know what our advice fees are going to be.



Delivering fair value.

As our client, you will always understand what you are paying for and the benefits that you can expect from our advice. We don't receive hidden commissions, so you can be confident that our advice is based solely on your needs.

You will always know what you are getting for your money.



Offering flexibility.

Your individual needs and preferences come first which is why we provide our clients the flexibility to stay updated on their progress in a way that suits them – whether it is via phone, email or online, you'll always have easy access to our team and expertise.

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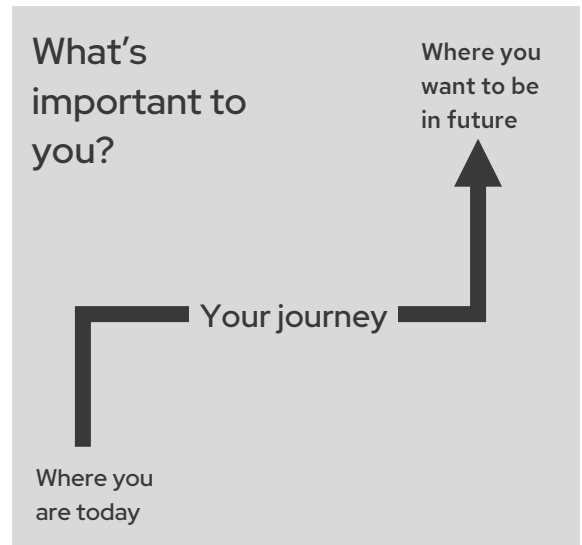
Turning our philosophy into practice

Our role is to understand your goals and objectives, then develop the strategies to help you achieve them.

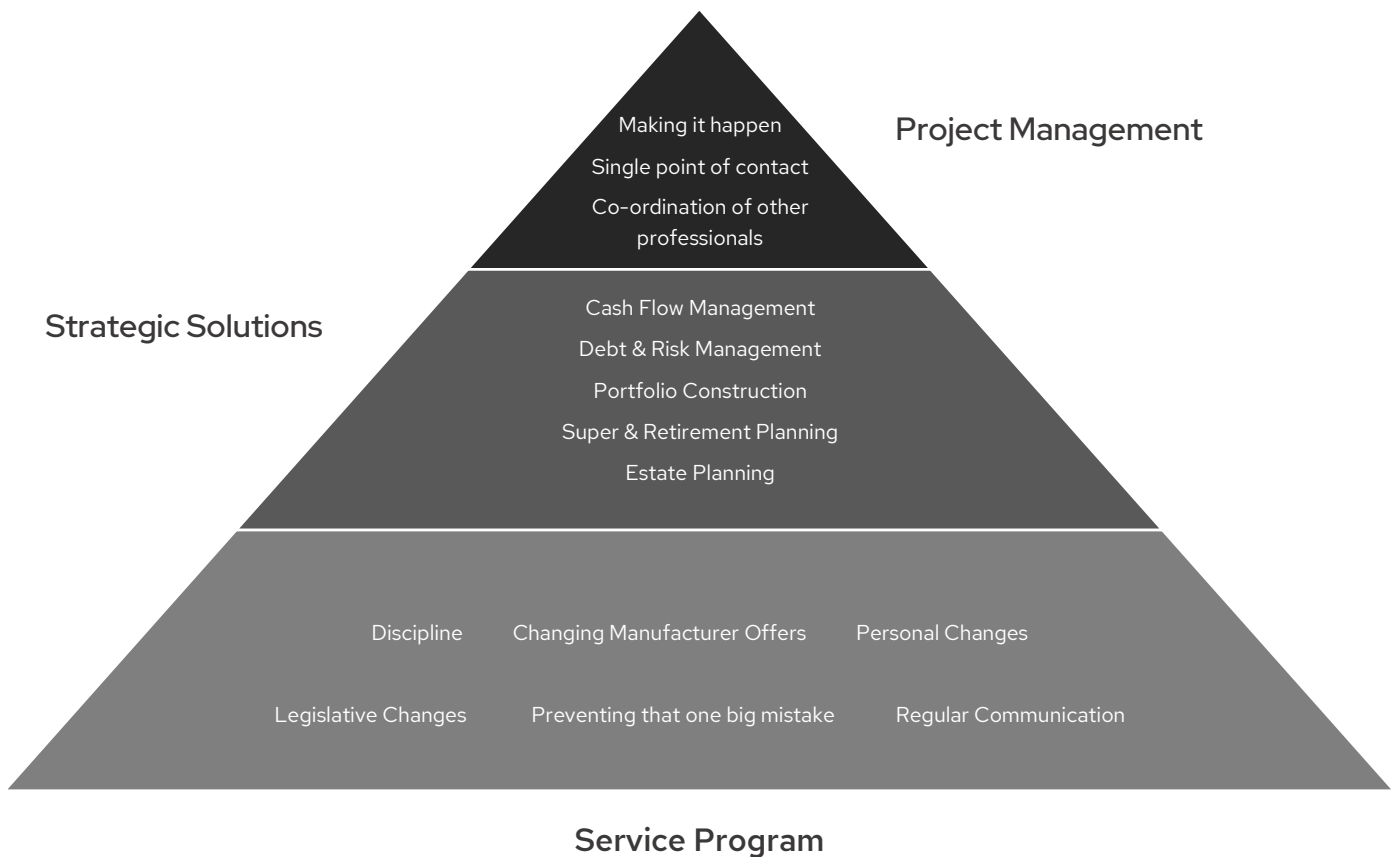
In our first appointment we will be able to determine the likely scope and complexity of the work involved as well as the value you are likely to derive from our advice. These factors combined will influence the fee for the advice.

It is important to have your financial plan reviewed regularly – just as your circumstances change, so do government legislation and market conditions.

Our service program includes assessing these changes and how they affect your financial plans so we can take the appropriate actions.



Our role as your Financial Adviser



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