

## Client Guarantee

*At each and every stage of our advisory relationship with you, we do everything possible to take away your concerns, exceed your expectations and give you guaranteed reassurance over your decision to use Appleton Fox.*

*We are confident that you will be truly satisfied every step of the way and that the value of the advice will always exceed the fee. However, if this is not the case then all you need do is bring this to our attention in writing, stating your reasons & also the fee that you believe to be fair & reasonable. On receipt of your letter we will organise your refund.*

The various stages in our advisory process have been carefully constructed to deliver maximum value.

**The Discovery Process** is designed to give you the opportunity to discuss your current situation, your worries and your concerns. It will also allow you to identify and focus on your planning objectives.

**Your Estate Protection Plan** will cover the planning options that are available to you. It will detail bespoke planning strategies designed to allow you to achieve your goals whilst resolving your worries and concerns.

**The Planning Meeting** is an optional meeting to discuss, review and amend your Wealth Management Plan prior to Implementation.

**The Implementation process** is a series of meetings to implement the recommendations within your Estate Protection Plan.

### **Fee-based Advice that's truly independent**

To re-inforce our independence, unlike others, we do not allow third party investment by product providers or other suppliers. Accordingly, the business is entirely owned by it's Partners.

We can therefore guarantee.....

- NEVER to advise you on any product or planning strategy other than the one most beneficial for you
- That we will consider every option before recommending the most appropriate unbiased strategy
- To advise you of every cost up front in order that you can decide if it's value for money