

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 Wealth Management 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 Wealth Management 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, insurance companies or other suppliers. Accordingly, the company is entirely owned by its Director's and is directly authorised and regulated by the Financial Conduct Authority.

We can therefore guarantee.....

- To rebate all commissions (protection policies only) back to you or into your product
- NEVER to advise you on any product 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