OUR COMMITMENT TO YOU

Our Focus

Providing an exceptional client service and making a positive impact on the lives of our clients is our key purpose. We are a team of highly experienced Wealth Managers whose expertise covers all aspects of private client financial advice. Our clients include successful families, business owners, company directors and those in retirement as well as a number of professional people from the legal, financial, media and fashion fields, all of whom appreciate the need for high quality bespoke advice and guidance.

Our key objective is to provide our clients with clarity and true financial independence, by considering every aspect of their lives, enabling them to feel confident about their financial future.

Your Experience

There are several stages to your journey with us and we promise to deliver a tailored service by carrying out the following:

Discovery Meeting
- We will seek to understand your objectives and current circumstances
- We will discuss issues arising that are important to you
- We will agree the next steps and time frames

Analysis & Research
- We will review and research your current arrangements
- We will organise and prepare your personal financial plan
- We will create bespoke advice to deliver your objectives and improve your situation

Planning Meeting
- We will present our advice
- We will work together to fine tune your financial plan
- We will agree the next steps with you

Implementation & Service Framework
- We will complete the work needed to implement what has been agreed
- We will agree your ongoing communication and review strategy

Review Meetings
- We will seek to understand what (if anything) has changed in your circumstances since we last met and adjust our service as required
- We will invest time in ensuring that we are fully aware of legislative changes that affect you and make pro-active recommendations accordingly
- We will review your investments and all other arrangements regularly and make recommendations for changes where necessary with an aim of delivering continued out-performance

Our Expertise

Our financial planning and guidance is complemented by expertise in the areas of:

Retirement Planning	**Investment Planning**	**Tax Planning Strategies**	**Risk Management**
Strategic Planning for Businesses	**Inheritance Tax Planning**	**Holistic Financial Planning**	

Our Commitment

By working with us you will:

- Have a tailored investment strategy
- Have a financial plan for your future
- Be prepared for unexpected circumstances
- Have a sense of progress towards your objectives
- Feel financially secure and supported
- Receive jargon free communication
- Be proactive in reviewing your financial planning, with review meetings at a mutually agreed frequency
- Receive an exclusive client communication programme tailored to your preferences
- Have 24/7 access to your personal online account
- Receive invitations to bespoke events and seminars

We are extremely proud to have developed strong relationships with our clients, which is reflected by the fact that we meet most of our new clients via personal recommendation. We believe that if we meet or exceed your expectations you will not only become and remain a client but that you might also become an advocate for our business.

To speak to a member of our team to discuss how Crawford Dean Wealth Management can help you, please contact our office on **020 8869 0959** and a member of our team will be more than happy to assist.

The value of an investment with St. James's Place will be directly linked to the performance of the funds you select and the value can therefore go down as well as up. You may get back less than you invested.

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