CLIENT SERVICE CHARTER

INTRODUCING YOUR PERSONAL WEALTH MANAGEMENT SERVICE

Welcome to Boote Financial Planning. As a client, you will now have access to a comprehensive range of wealth management advice and receive an extremely high standard of personal service. The main aspects of the St. James's Place Client Service Charter are as follows;

DAN BOOTE
Managing Director of
Boote Financial Planning Ltd
Partner Practice of
St. James's Place Wealth Management

- **Ongoing Tailored Wealth Management Advice** – we offer a tailored advice service to all clients. As your individual circumstances change, we can help you with ongoing support to achieve your financial goals. The comprehensive wealth management advice service we offer broadly covers;
  - Preserving and building capital
  - Planning for a successful retirement
  - Reducing Inheritance Tax liability
  - Gaining financial protection against risk
- **A Distinctive Approach to Investment Management** – At St. James's Place we recognise that no single investment house has a monopoly on investment expertise. Hence, we provide access to a carefully selected group of external managers of outstanding ability to manage our range of funds. The external fund managers are selected and closely monitored by our Investment Committee on behalf of our clients. The Investment Committee is assisted by Stamford Associates, a leading international investment consultancy that provides independent advice on the selection and monitoring of investment managers.
- **Annual Confidential Review** – Regular face-to-face reviews and telephone reviews are an important part of the ongoing service. A full review of your finances can also be conducted at your convenience.
- **'My Documents'** – This document is exclusively available for clients of St. James's Place, designed to ensure that your key professional contact details and summary information of your financial affairs are held in one place.
- **Online Investment Valuations** – Visit our website www.bootefinancial.co.uk to obtain information, details and current valuation of your St. James's Place investment holdings at your convenience.
- **Annual Wealth Account** – This is an annual statement sent detailing the value of all your St. James's Place investments and policies held.

Guaranteed Advice
St. James's Place guarantees the suitability of the advice given by members of the St. James's Place Partnership when recommending any of the wealth management products and services available from companies in the group.

EXCLUSIVE CLIENT COMMUNICATIONS AND EVENTS

There is also a range of exclusive wealth management communications, briefings and client events for you to choose from. This will ensure you are kept up-to-date with all the latest economic information including any key changes that may affect your financial future.

- **Insights** – online access to news and thought-provoking articles on matters that affect your wealth via our website. Articles cover a variety of topics, from the latest data and fund managers' perspectives, through to key issues and developments in tax and pension planning.

- **The Investor** – a quarterly publication that includes features and interviews with some of the fund managers that are available through St. James's Place. This provides an excellent insight into their views on the current markets as well as their views for the future.

- **E-Briefing Service** – an exclusive programme of wealth management email communications delivered directly to you on a daily, weekly, monthly or quarterly basis. You can select your personal areas of interest from a range of topics; to register, please visit **www.bootefinancial.co.uk**.

If you would like to know more about the our Client Service Charter or if you have any other financial questions or concerns you wish to discuss, please contact **Boote Financial Planning** on 01242 210087.

Kind regards

Dan Boote DipPFS
Managing Director of Boote Financial Planning Ltd
Partner Practice of St. James's Place Wealth Management

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WE PUT OUR CLIENTS FIRST

St. James's Place Wealth Management has built long-term, trusted client relationships and we are delighted to have received a number of prestigious awards over the years. These include;

The Personal Finance Awards 2015/16 WINNER | BRITAIN'S MOST ADMIRED COMPANIES 2015/16 WINNER | investors CHRONICLE FT Investment and Wealth Management Awards 2015 Winner | COLWMA CITY OF LONDON WEALTH MANAGEMENT AWARDS WINNER 2015 | wealthadviser AWARD WINNER 2015