

# How to engage us

## – a simple flow chart to explain the process



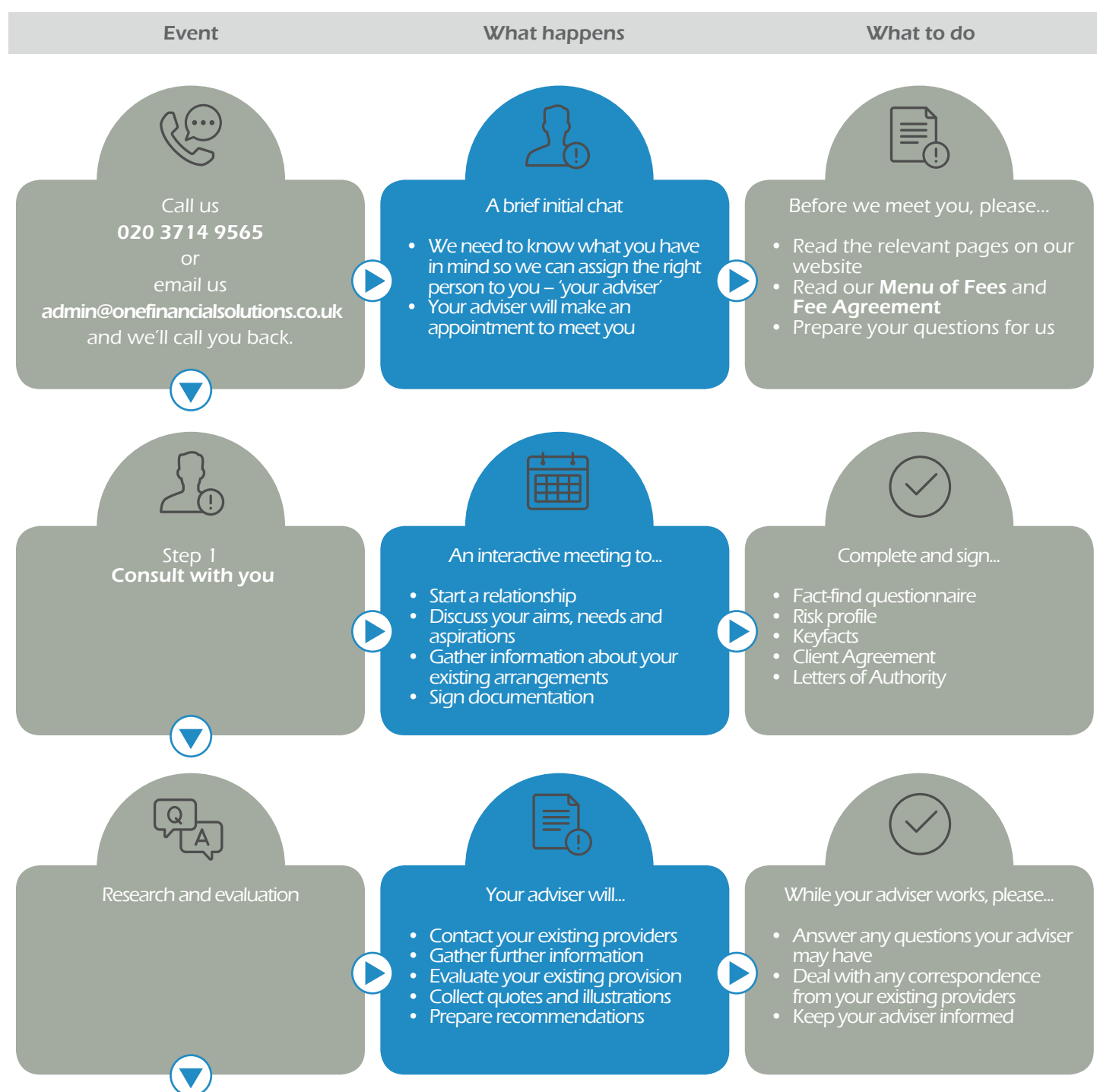
One solution for all your financial needs

There are several ways you may have found us. We may have been recommended to you by someone who knows us, possibly a client; you may have looked for financial advisers on the internet; seen an advert or approached us at a financial services show. Hopefully, you'll have taken a few moments to look at our website and read any literature we may have sent or given you. So, what happens next?

If you feel we may be the right firm of independent financial advisers to help you, it's easy to engage our

services – just call us or send us an email asking us to call you when it's convenient for us to talk to you.

The process of engaging us is best shown in a simple flow chart which explains what happens and what you need to do at every step in the process, from that first phone call to the final step: **'Sit back and enjoying the benefits of the work your adviser has done for you'**.





## Step 2 Advise you

Your adviser will meet you to...

- Discuss your existing arrangements and how they compare to your aims, needs and aspirations
- Explain your options
- Present our recommendations
- Ask for your approval



You may need to sign...

- Product applications
- Investment instructions
- Trust documentation



## Step 3 Implement your instructions

With your approval, your adviser will...

- Implement the recommendations we've made
- Submit any applications and instructions
- Set everything up for you



We'll send you suitability letters to...

- Confirm why we feel our recommendations meet your needs
- Confirm that any documentation has been processed
- Explain what happens next



## Step 4 Service your ongoing needs

Meetings with your adviser to...

- Review your products and investments
- Ensure they continue to meet your needs
- Take any necessary action to enhance their performance



Sit back and...

- Contact your adviser if you have any questions
- Enjoy the benefits of the work your adviser has done for you

One Financial Solutions is here to help you.

We advise on a wide range of financial services including protection for both you and your business, general and business insurance, savings and investments, commercial finance, pensions and auto enrolment, employee benefits, profit extraction and mortgages: our aim being to provide you with 'one solution' for all your financial needs.

We provide truly independent financial advice, sourced from the whole of the financial marketplace, for individuals and commercial businesses throughout the United Kingdom.

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