

XYZ Financial Services

At XYZ Financial Services we believe that professional financial advice can add significant value to individuals and businesses. It is because of this belief that we provide a comprehensive ongoing review service designed to create real value for our clients.

As your partner in building wealth and security, we focus on ways that we can help you to live the life that you want to live. By engaging XYZ you assure yourself of regular financial checkups and access to new ideas brought to you by the XYZ team. Choosing a financial partner is one of the most important decisions you will ever make. Take your time, choose wisely, and we hope that we can earn the right to work with you into the future.

The XYZ Partner Service

An Annual Review Meeting With Your Adviser Including

- A Complete Review Of Your Financial Strategy
- The XYZ 12 Point Financial Health Check

Unlimited Telephone & Email Access To Your Adviser

Unlimited Face To Face Access To Your Adviser Between Review Dates

The Professionals Service:

- Providing Strategic Updates To Your Accountant & Any Other Professional Advisers
- Supplying End Of Year Taxation Information (as required)
- Recommending Suitable Professionals As Other Needs Arise

*Ensuring that everyone on your financial team provides advice in a co-ordinated and professional way.

The Portfolio Construction Service:

- Using A Scientific Risk Profiling Methodology
- Design Of A Suitable Asset Allocation
- Portfolio Design and Construction

The Portfolio Management Service

- Online Access To Portfolio Valuations
- Portfolio Monitoring
- Re-Weighting of Asset Allocation To Benchmark
- Written Portfolio Valuations On Request

The Priority Response Service

- Phone Calls & Emails Returned Within 24 Hours

The Remove The Hassle Service

- Taking The Complexity And Hassle Out Of Administering Your Financial Life

The Second Opinion Service

- Making Ourselves Available To Consider New Ideas From Whatever Source They May Originate

The Inheritance Tax & Estate Planning Service

The Taxation Planning Service

- In Conjunction With Your Accountant And Other Taxation Advisers

The SIPP Service

- Value Added Strategies Using Self Invested Personal Pensions (SIPPs)
- Specialist Advice For Owning Business Premises

The Pensions Service

- Pensions Advice
- Pensions Review
- Pensions Consolidation

*Advise Better
Live Better*