Suckling Waddington
and partners
Providing financial advice since 1973

The Advice Process at Suckling Waddington and Partners

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The information contained in this document does not in any way constitute advice. Professional advice should always be sought before making investment decisions.

Understanding You · Planning · Implementation · Review

Understanding You

Our process begins with Understanding You - a free-of-charge Initial Meeting will serve as a 'fact-find', allowing us to look at your goals, your means and you current attitude to risk. This is important, as we need to balance the things you want to achieve with what you are emotionally and financially able to risk.

The Initial Meeting will also review any relevant paperwork and lay down clear details on total charges, what advice or service it relates to, how it has been calculated and when it is due to be paid.

Planning

Once we have all the information, our team will go away and begin our research. Taking into account your personal goals and attitude to risk, we will aim to find the best solutions to suit your requirements.

After our research is complete, we will present you with our findings. We will take you through all of the options, discussing the pros and cons of each before eventually deciding on the best course of action. Again, this stage will confirm total and ongoing charges before anything is finalised.

Advice Process

Thank you for choosing Suckling Waddington Partners to advise you on all things financial. We look forward to working with you and achieving your goals. Our financial planning process is an ongoing service to ensure our advice and recommendations continue to be the right options for you.

Excellent client relationships are at the centre of everything we do and you will be looked after by approachable, friendly advisers - all of whom are diploma qualified, experienced and knowledgeable.

Our four-stage Advice Process is designed to ensure complete satisfaction. We also have an extensive and robust due diligence process in place for extra peace of mind.

Review

After the Implementation Stage, our service and support doesn't just stop - instead, we believe ongoing communication and regular reviews are the best way to ensure your plan is still working for you. As priorities and plans change in life, we hope to review and (where necessary) modify your plan to suit any new requirements.

This part of the service will include recommending changes to new or existing investments to help meet your goals at an acceptable level of investment risk, providing fund analysis and valuations, as well as a wide range of associated and ad-hoc services.

Implementation

As part of your financial plan, we offer a number of services to make everything go as smoothly as possible. If required, we can liaise with qualified and experienced accountants and solicitors on your behalf to provide a holistic experience.

Furthermore, for clients with an investments portfolio, our service includes online access to view your account information whenever you wish. This will keep you up-to-date with your investments at the touch of a button.

We also look to stay ahead of the curve by giving you access to the latest technology available. We always look to provide our High Touch clients with the newest software as it becomes available, thereby providing the highest level of service.