COUNTY FINANCIAL
MAKING SENSE OF MONEY

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The advisory review service

At County Financial we believe that professional financial advice can add significant value to individuals and businesses. It is because of this belief that we provide an on-going review service designed to create real value for our clients.

Our aim is to partner our clients to provide the best opportunity for them to achieve their financial objectives. Our financial planning process automatically provides regular financial check-ups and access to new ideas brought to you by the County team.

You will automatically receive an invitation to an annual review meeting with your adviser and the following is a description of the on-going advice services available to you.

You Receive

- An annual review meeting with your Planner including
  - A review of your financial circumstances
- Unlimited telephone and e-mail access to your Planning Team
- Face to face access to your Planner by appointment between review dates
- The Client Seminar service
  - Client seminars on topical financial issues
- The second opinion service
  - Making ourselves available to consider new ideas from whatever source they may originate
- Professional liaison service
  - Providing information to your accountant, solicitor or other professional advisers
  - Supplying end of year tax information (as required)
  - Recommending suitable professionals as other needs arise

- Investment portfolio risk profiling service
  - A scientific risk profiling methodology
  - Design of a suitable asset allocation for your portfolio
- Investment portfolio management service
  - Portfolio monitoring
  - Written portfolio valuations on request
  - Investment reviews
- The Pension service
  - Pensions review and advice
  - Future pensions strategy
  - Retirement strategies
- The Pension Drawdown service
  - Value added strategies using the tax benefits available through pension drawdown
- Inheritance tax and estate planning service
  - Inheritance tax reduction strategies
  - A referral service to Sarah Steel for Wills and Lasting Powers of Attorney
- The Tax Planning service
  - In conjunction with your accountant and other taxation advisers
- The 'remove the hassle' service
  - Taking the complexity (and paper!) out of administering your financial life.

What it costs:

An adviser charge based on a pre-agreed fixed fee, typically £300+VAT.