

Our Client Charter

What can you expect?

Our first priority is to deliver the best possible service and outcomes for our clients, and we believe that being independently owned allows us to achieve this better.

Servicing a range of retail clients with their financial planning and investing needs, with a selection of consistently award-winning services, we aim to comprehensively understand our clients' needs, to build our services around these requirements, to communicate clearly and to support them to achieve the outcomes they are working towards. We aim to continue to adapt, innovate and improve, just as our clients' needs and expectations change.

Understanding your needs and regular reviews

First, we build an accurate picture of your needs, circumstances, preferences, objectives and attitudes such as your attitude to risk. This helps us recommend the service options that might suit you best. And as appropriate to the service and your preferences, we will regularly review these requirements, to continue to personalise the advice to your individual needs and goals,

through things like a personal financial plan for wealth planning clients and an agreed investment approach.

Communication and transparency

We will communicate with our clients clearly, promptly and in plain language. We will be transparent about our fees, investment strategies, and any potential conflicts of interest.

Your Adviser acts as a trusted partner, and the more they can understand any changes in your circumstances, even those outside of financial matters (such as personal challenges with work, health or relationships), the better they can ensure you are positioned to respond to these circumstances, from a financial perspective.

Customer support

As well as our Advisers, we have a variety of operational and technical teams, systems and technology to support our clients. If and when you need it, customer support is available via [+44 \(0\) 20 7337 0400](tel:+44202073370400) / clientsupport@killik.com. They aim to respond to all enquiries within one business day.

Feedback

As well as a variety of measurements and controls, we also seek feedback directly from clients across a range of methods and we hope you are able to contribute in providing feedback in future.

However, if at any time you feel we are not meeting the expectations within this charter, then please let us know. We want to work with our clients to improve, wherever we can rectify issues or identify better ways of doing things.

