

Service commitment charter

We believe it is important to work alongside the right adviser (our Partners). Someone you trust and who listens, understands what you want to achieve and gets to the heart of what matters to you. Our goal is to support you with every significant financial decision you make.

Equally as important is for you to receive an outstanding level of service, not only from your Partner, but from everyone else you may encounter at Foster Denovo.

We have pledged to meet certain standards, and these are listed here for you to read.

Should you have any questions, please feel free to speak with your Partner in the first instance, or contact our Head of Client Experience, Paula Brazier, on 01932 870745, or email Paula at paula.brazier@fosterdenovo.com who will be happy to help.

Our commitment to you

We will:

- agree exactly what work you expect to be carried out and the service levels you should experience before we start any work;
- provide you with clear information about the service offered, including fees and charges, and have a signed agreement in place before any work starts;
- mutually agree any timescales, and key dates with you before any work commences. If it becomes apparent these timescales are unlikely to be met, we will tell you at the earliest opportunity;
- always agree any additional work and charges with you before we start this work;
- where applicable, hold regular meetings, (face to face, on the phone, or via video conferencing) with you to provide updates as agreed in our Client Agreement Letter/Client Engagement Letter/Fee Agreement/Scope of Works. Where expected, you will also receive written confirmation detailing the work agreed;
- let you know a named contact who will take responsibility for any work agreed, and a named contact during any period of absenteeism;
- be proactive, forward thinking, and collaborative when we work with you;
- make sure we acknowledge emails, which require a response, in a timely manner. We will provide timescales if we cannot resolve any request immediately, and will continue to update you regularly if it is not possible to provide an immediate resolution;
- aim to get it right first time, and work with a high level of accuracy;
- communicate in plain English, without the use of unnecessary jargon; and
- follow the principles for Treating Customers Fairly and work within the Financial Conduct Authority guidelines;

Your commitment to us

In exchange for our commitment to you, we ask our clients to support us so that we can achieve the best results together.

We ask you to:

- be honest about your personal, financial and/or company circumstances, needs, preferences and objectives. Our advice will be based on the information you give to us;
- keep us informed of any change in your financial circumstances;
- agree to provide necessary information when required, to make sure we can meet agreed services and expectations;
- pay agreed invoices/fees in a timely fashion. If you are unable to meet the agreed timescales, you will notify us of the reasons;
- if applicable, agree to meet with us (face to face, phone or via video conferencing), annually to review the ongoing service you receive and discuss any areas necessary;
- provide us with occasional requests for feedback. Your comments will help shape and improve the experience you, and our other clients, will receive; and
- consider recommending your Partner to your friends and family (if you feel comfortable doing so).

Please note, this list is not exhaustive and forms part of, and is in addition, to our obligations to meet our regulatory requirements.