

Advice Process

Costs and Services

Our aim is to establish a long-term relationship working with you to help you to build and retain wealth. Our client centered approach at Consequential Planning is focused on providing advice that is relevant to your circumstances and at a cost that is proportionate to the work we carry out. Our methods will ensure that you benefit in real terms from any recommended actions.



STEP 1 – Initial Meeting – Free of Charge

The aim of the meeting is to understand your financial circumstances, needs, and goals. This will involve completing a Factfind, a short document detailing your personal information. We will also establish your attitude to risk and capacity for loss through a risk report.



STEP 2 – Research – Free of Charge

It may be necessary to request further information from your existing providers to fully understand your current financial situation. This will help us to ensure that we meet your goals and requirements. We will communicate any findings to you.



STEP 3 – Recommendations and Implementation – Standard charging structure - 1.5% initial advice charge capped at £5,000 with a minimum cost of £750.

Before any action is taken, any advice is provided in writing to you in a detailed report explaining our recommendations and how this will help you achieve your financial goals. A further meeting will be arranged for an adviser to run through this report and answer any questions that you have. Once an agreement has been made on how to move forward, we will ensure any recommended actions are implemented and the necessary paperwork completed.



STEP 4 – Optional Ongoing Advice Service – 0.5% annual charge paid on funds under management, paid monthly, capped at £5,000

Once we have set up your new financial plans, you will receive confirmation from ourselves and your new providers. Our ongoing advice service is optional but if you choose this service we will be in contact on a regular basis (at least annually) to review your financial circumstances, monitor your plans, and to make sure they are on track to meet your financial objectives..

Alternative charging structure for more complex cases (for example, where advice is needed in several different areas or where additional research is required) - £300 per hour with a minimum fee of £3,000.

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