sense

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Levels of service

As our client, you choose the level of service that you want from us. The more you want, the more it costs, but we will never over-charge you and will always discuss our fees in advance.

We strive to offer all of our clients the highest levels of service and innovative solutions for their financial planning goals. As a result we provide clearly defined service levels in order to ensure that the way we conduct business for you meets with your expectations.

For those clients wishing to build a professional relationship with us we offer two distinct levels of service so that we can give you advice and guidance on a regular basis. For those clients who do not require regular advice we are able to offer a transaction only service to meet any specific needs that they might have.

Sense Wealth Management Service

Our Wealth Management advisory service is a fully comprehensive fee based financial planning service and is typically for clients who have a minimum of £250,000 liquid assets and who may have taken advantage of the Sense Financial Plan.

Regular financial planning meetings are held, including pensions, investments and estate planning reviews, to keep the plan updated and to identify any action that may be required.

Pension and investment portfolio valuations are provided on a six-monthly basis.

Where appropriate a discretionary fund management service is included in this service providing a highly personalised investment structure.

Client newsletters are also provided on a regular basis.

Clients have guaranteed priority access to us throughout the year.

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Sense Lifetime Service

Our Lifetime advisory service is a fee based service for those clients who want ongoing advice and planning irrespective of their financial circumstances.

A financial planning meeting is held once a year which covers all aspects of financial advice, investments, pensions, mortgage, protection, tax planning, estate planning, wills, etc.

Pension and investment portfolio valuations are provided on an annual basis.

Client newsletters are also provided on a regular basis.

Clients have guaranteed priority access to us throughout the year.

Sense Solutions Service

Our transactional service is for clients who require specific advice, or specific products to deal with particular issues, and have no requirement for ongoing service.

Some examples would be: life assurance, income protection, small investments, or children's savings plans.

Our fees and charges will be outlined to you and agreed before any work commences.

As this service is for clients who do not require ongoing advice or a close personal servicing relationship, Sense will only continue to deal with the administration of your file. Should you contact us to request any further advice we will do our best to assist you. However, please note that, as clients who pay a service fee receive priority, we cannot guarantee the availability of a consultant.

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