ST. JAMES'S PLACE
WEALTH MANAGEMENT

CLIENT SERVICE CHARTER

Introducing your personal wealth management service

Welcome to St. James's Place. As a client, you will now have access to a comprehensive range of wealth management advice and receive an extremely high standard of personal service. The main aspects of the St. James's Place Client Service Charter are as follows;

Stephen Hope
Wealth Management

Associate Partner Practice of
St. James's Place Wealth Management

- **Ongoing Tailored Wealth Management Advice** – we offer a tailored advice service to all clients. As your individual circumstances change, we can help you with ongoing advice to achieve your financial goals. The comprehensive wealth management advice service we offer broadly covers;
  - Preserving and building capital
  - Planning for a successful retirement
  - Reducing Inheritance Tax liability
  - Gaining financial protection against risk
- **A Distinctive Approach to Investment Management** – At St. James's Place we recognise that no single investment house has a monopoly on investment expertise. Hence, we provide access to a carefully selected group of external managers of outstanding ability to manage our range of funds. The external fund managers are selected and closely monitored by our Investment Committee on behalf of our clients. The Investment Committee is assisted by Stamford Associates, a leading international investment consultancy that provides independent advice on the selection and monitoring of investment managers.
- **Annual Confidential Review** – Regular face-to-face reviews and telephone reviews are an important part of the ongoing service. A full review of your finances can also be conducted at your convenience.
- **'My Documents'** – This document is exclusively available for clients of St. James's Place, designed to ensure that your key professional contact details and summary information of your financial affairs are held in one place.
- **Online Investment Valuations** – Visit our website **www.stephenhopewealthmanagement.com** to obtain information, details and current valuation of your St. James's Place investment holdings at your convenience.
- **Annual Wealth Account** – This is an annual statement sent detailing the value of all your St. James's Place investments and policies held.

Guaranteed Advice
St. James's Place guarantees the suitability of the advice given by members of the St. James's Place Partnership when recommending any of the wealth management products and services available from companies in the group.

Exclusive client communications & events

There is also a range of exclusive wealth management communications, briefings and client events for you to choose from, to ensure you are kept up-to-date with all the latest economic information including any key changes in taxation.

- **Weekly Monday Market E-Bulletin** – a two page document that is emailed on a Monday that picks out some of the key financial market and economic issues touched on in the press over recent days, and from time to time includes the views of some of our independent fund managers.

- **Quarterly Investor Magazine** – a quarterly publication that includes features and interviews with some of the fund managers that are available through St. James's Place. This provides an excellent insight into their views on the current markets as well as their views for the future.

- **Regular Topical Briefings and Client Events** – helpful information and advice covering a wide variety of subjects including key changes to financial markets, macro-economic environment and legislation.

If you would like to know more about the St. James's Place Client Charter service or if you have any other financial questions or concerns you wish to discuss, please contact me on 07961070403. Kind regards

Stephen Hope CeFA CeMAP DipFA MIFS
Principal of Stephen Hope Wealth Management
Associate Partner Practice of St. James's Place Wealth Management

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We put our clients first

St. James's Place Wealth Management has built long-term, trusted client relationships and we are delighted to have received a number of prestigious awards over the years, including the following as voted for by readers of the FT/Investors Chronicle, the UK Stock Market and City of London respectively.