On-going Service Options

3 Hassall Court
Long Acre
Bingham
Nottinghamshire
NG13 8BS

	Standard	Enhanced
Availability based on minimum level of funds under advice (FUA).	No Minimum	£50,000
Formal, annual re-assessment of the continued, on-going suitability of your financial planning strategy and arrangements, conducted **remotely** or **face-to-face** at our Administration Office in the Midlands.	✓	✗
Formal, annual re-assessment of the continued, on-going suitability of your financial planning strategy and arrangements, conducted **face-to-face** at your chosen location.	✗	✓
At request, additional **remote** or **face-to-face** (at our aforementioned Administration Office in the Midlands) re-assessment(s) of the continued, on-going suitability of your financial planning strategy and arrangements, where FUA are at £250,000 or greater.	✗	✓ FUA of £250,000 to £499,999 = once a year FUA of £500,000 to £999,999 = twice a year FUA of £1,000,000 and above = three times a year
Access to RA Elmes Financial Planning via telephone, e-mail and post, during normal office hours.	✓	✓

	Standard	**Enhanced**
Presentation of reports and supporting documentation – typically in electronic format – at review meetings, providing a full overview of your financial plans and performance. This documentation may outline any adjustments we feel are necessary to consider.	✓	✓
Subsequent possible re-balancing of existing portfolios and execution of other associated switch trading instructions.	✓	✓
For portfolios held via the firm's designated "platform providers", re-balancing exercises may be carried out up to four times each year between review meetings, taking into account RA Elmes Financial Planning's evolving strategic asset allocation and investment process. Any proposed changes will be notified to you via e-mail only, and you will need to respond by the same medium to confirm your acceptance of any proposed changes before their implementation.	✗	✓
Capital gains tax (CGT) reporting and planning in respect of your FUA with RA Elmes Financial Planning.	✗	✓
Liaison with your tax and legal advisers as necessary, for example in preparing to submit tax returns.	✗	✓
Access to RA Elmes Financial Planning's inheritance tax and generational wealth planning services.	✗	✓