

BespokeAdvice

Customer Charter

As a certified B Corporation we're dedicated to building and running a business that looks beyond profit; that believes in making the world a better place for everyone; that believes in looking after people properly.

We're committed to placing the needs of our clients front and centre and to making sure that we're everything they expect us to be. Trust is the licence by which we operate and the maintenance of that trust is always at the heart of every decision we make and action we take.

We're committed to:

Our Independence

We provide Independent Financial Advice to our clients and that is all we do. We don't manufacture financial products, nor are we aligned to or in partnership with any investment companies, product providers or technology solutions. We consider all available products and solutions for our clients and make our recommendations based solely on their needs.

We believe this to be in the best interests of our clients.

Fair and Transparent Charging

We believe that all fees and charges levied to our customers should be fair, visible, transparent and easy to understand. That's why we make sure that all our clients understand and agree what they will have to pay for the advice and services they receive, both initially and on an ongoing basis (if applicable), before any work is undertaken on their behalf.

We believe in delivering value too and, to that end, we've put in place a ceiling on all our fees to ensure that no-one pays more than is required.

Good relationships are built on one thing: Fair exchange.

Competence

We believe that every client has the right to expect that any person providing financial advice in a professional capacity is competent to do so, both generally and with regard to all required specialisms.

That's why we expect and encourage all our Bespoke Independent Financial Advisers to achieve the highest levels of qualification and excellence, and allow them to advise only on the areas where competence is proven and demonstrable.

We see this as a minimum requirement and therefore extend it to our support and admin team as well.

Supporting Your Needs

When you select your financial adviser, you're placing your trust in them and your financial wellbeing in their hands. You expect them to look after you and be there when you need them, whenever that might be.

We believe that too, and that's why we've invested in creating a support system that sits behind your Bespoke adviser ensuring that you access the support you need irrespective of whether they're available or not.

Our clients can expect to receive the support and service of our entire business, not just the Financial Adviser they regularly see.

Good Governance

We believe in doing things properly. We don't like short cuts and quick fixes.

We're dedicated to delivering good governance for the sake of all our stakeholders: our regulator, our clients, our shareholders, our employees, our community and our planet.

Our sustainability depends on it, and those that depend on us depend on our sustainability.

After all, being a good business is good business.