

Customer Statement



As a client of AWD Chase de Vere we will always endeavour to provide you with the highest possible standard of service and advice. Our regulator, the Financial Services Authority, has recently focused on an initiative referred to as "Treating Customers Fairly" (TCF): it is important that we are able to demonstrate that this is an integral part of all areas of our business.

The broad TCF principles fit perfectly into our long term aspirations and good business dictates that if we act in your best interests then both you and AWD will benefit.

Our Commitment to You

We will:

- Provide you with clear information about those areas of advice, products and services that we offer. This will include any fees and costs that may be incurred.
- Ensure that we understand your requirements, preferences and circumstances before we make any recommendation.
- Only recommend a product or service that is both affordable and suitable for your needs.
- Not recommend a course of action, or that you purchase a product, if we cannot find one that we consider suitable for you.
- Always provide you with clarification in the event that something is unclear.
- Offer regular reviews to ensure that your financial strategy and any products that you may have used remain suited to your needs and objectives. There may be circumstances where this is not required, in which case the appropriate level of service will be agreed.
- Give you access to a formal complaints procedure should you become unhappy with our service.

How You Can Help Us

To ensure that we give you the most appropriate advice we will ask you to:

- Carefully consider and discuss your financial objectives and goals.
- Provide us with sufficient financial information to enable us to properly assess your situation.
- Inform us about changes that might affect you financially, including any lifestyle change such as marriage or change of employment status.
- Inform us if you don't understand something relating to the advice or service you have received, or any product that has been discussed or recommended.
- Provide feedback to us on our services including any ways you feel they could be improved.