



# ILLINGWORTH SEDDON

— CHARTERED FINANCIAL PLANNERS —

## CLIENT SERVICE CHARTER

PARTNER PRACTICE OF



ST. JAMES'S PLACE  
WEALTH MANAGEMENT

# YOUR PERSONAL WEALTH MANAGEMENT SERVICE

---

---

At Illingworth Seddon we are committed to building and sustaining long-term relationships based on trust, superior service and the quality of our initial and on-going advice. Our philosophy is simple, to provide a high quality service, bespoke to your individual requirements.

## **ONGOING TAILORED WEALTH MANAGEMENT ADVICE**

We offer a tailored advice service to all clients. As your individual circumstances change, we can help you with on-going advice to achieve your financial goals. The comprehensive wealth management advice service we offer broadly covers;

- Preserving and building capital
- Long Term Care planning
- Gaining financial protection against risk
- Corporate investments and protection

## **A DISTINCTIVE APPROACH TO INVESTMENT MANAGEMENT**

At Illingworth Seddon we recognise that no single investment house has a monopoly on investment expertise. Hence as a partner practice of St. James's Place we are able to provide access to a carefully selected group of external managers of outstanding ability to manage our client's funds. The external fund managers are selected and closely monitored by St. James's Place's 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 on-going 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.illingworthseddon.co.uk](http://www.illingworthseddon.co.uk) to obtain information, details and current valuation of your St. James's Place investment holdings at your convenience. To register for this service please click on 'existing clients' and register.

## **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**

The St. James's Place Wealth Management Group guarantees our advice to you when we recommend any of the products and services provided by companies within 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. These include:

## **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.

## **EXCLUSIVE E-BRIEFING SERVICE**

Exclusive e-communications that keep you informed of the latest market news and fund manager views and provides tax, pension and estate planning insights and how they affect your wealth. You can select the key topics and briefings you would like to receive by email, and importantly update your preferences at any time.

## **REGULAR TOPICAL BRIEFINGS & CLIENT EVENTS**

Helpful information and advice covering a wide variety of subjects including key changes to financial markets, macro-economic environment and legislation.





ILLINGWORTH SEDDON  
— CHARTERED FINANCIAL PLANNERS —

THE OLD SCHOOL  
HIGH STREET TATTENHALL  
CHESHIRE CH3 9PX

TEL: 01829 771707

FAX: 01829 771195

EMAIL: [illingworthseddon@sjpp.co.uk](mailto:illingworthseddon@sjpp.co.uk)

WEB: [www.illingworthseddon.co.uk](http://www.illingworthseddon.co.uk)

PARTNER PRACTICE OF



ST. JAMES'S PLACE  
WEALTH MANAGEMENT

Illingworth Seddon Chartered Financial Planners represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the Group's wealth management products and services, more details of which are set out on the Group's website [www.sjp.co.uk/products](http://www.sjp.co.uk/products). The 'St. James's Place Partnership' and the titles 'Partner' and 'Partner Practice' are marketing terms used to describe St. James's Place representatives.