Alexander Peter
Wealth Management

Your guide to ongoing service

Designed for you and your needs – now and into the future

www.alexanderpeter.com

Our ongoing service

Our help and management doesn't just stop with the initial advice you receive – it carries on for as long as you want it to

We like to work with our clients on a long-term basis. According to research from Old Mutual Wealth 90% of people who see a financial adviser on a regular basis feel the advice has benefited them.

Following the completion of our initial advice, we will provide you with a level of ongoing service that is designed to suit your needs.

What is ongoing service?

Ongoing Service is a personal service delivered by our Wealth Management Team. Its our commitment to you and has been designed around you and your needs, now and in the future. Once you've received your initial advice from your Financial Planner our Wealth Management Team will undertake the responsibility to provide you with the support, tools and communication to effectively manage your investments.

You can be confident that your finances are being reviewed by an expert now and in the future. What's more should your circumstances change your Wealth Manager will ensure that your plans are adapted to keep working towards your financial goals. Whether that be a level of income in retirement or building a nest egg for the future.

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Your ongoing relationship

A personal service delivered by our wealth management team

When your pension/investment or both is set up our Wealth Management Team will contact you on an annual or quarterly basis depending on the service you have opted for to review and ensure your financial goals are still on track.

Tailored financial recommendation:

- Initially your financial consultant will spend time getting to know you and your objectives.
- They will build a plan based on your current circumstances, financial objectives and risk profile.
- You will then receive a tailored financial recommendation based on our understanding of your circumstances and what you want to achieve.

Throughout life your needs and goals may change, but our ongoing service and Wealth Management will always be there to help

Wealth management team

Your Wealth Manager is there to advise and guide you and ultimately to help you reach your Financial Goals

You can contact your wealth manager when you need them, whether your circumstances have changed or you have more money to invest. You can also expect your Wealth Manager to contact you at least once a year or once a quarter to provide you with an update and provide a full review.

What will the review cover?

During a review meeting your Wealth Manager will discuss:

- Any changes to your circumstances
- Any progress that's been made towards meeting your agreed financial objectives
- Any changes you may wish to make as a result of the above to your agreed objectives, attitude to investment risk and your arrangements

Based on your review meeting your Wealth Manager may discuss other services we can offer that maybe appropriate. For example if you've had children you may wish to plan for their future.

Your Wealth Manager is here to guide and advise and will not make changes on your behalf unless you've given instruction to do so.

You can contact your wealth manager when you need them

Personal financial report

Every year or every quarter you can expect to receive a Personal Financial Report to give you a better understanding of how you portfolio is performing

Your personal financial report will be emailed to you securely and will form a point of discussion for when your wealth manager calls you for a review.

It will help you understand whether your on track to achieve your goals and together you and your wealth manager can assess if any adjustments need to be made.

If you have opted for the Wealth Management Service your report will be sent on a calendar quarter basis however you can always request from your wealth manager an addition report from any time period you like. As an example a fiscal year for tax accounting purposes.

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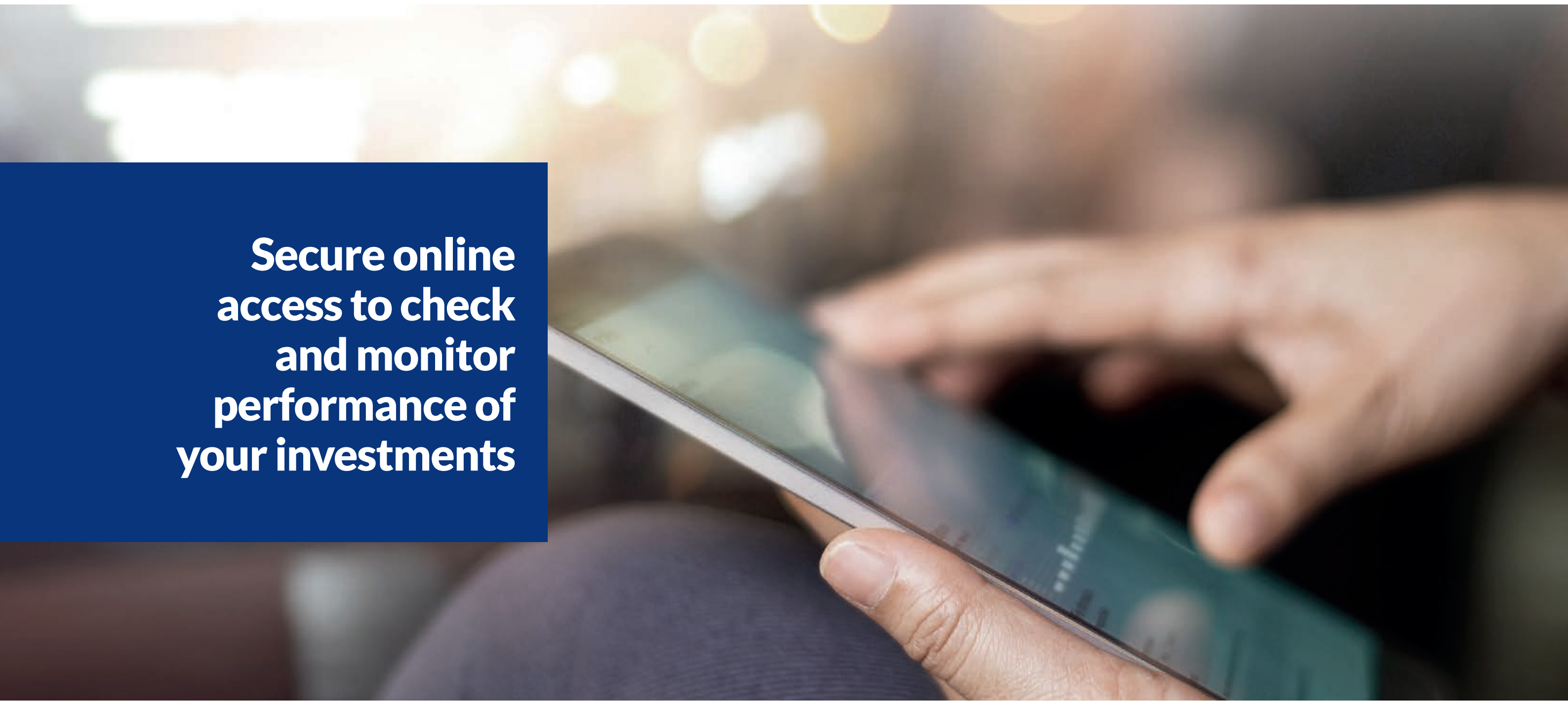
Client portal



Secure online access to check and monitor performance of your investments

What is the Client Portal?

The client portal gives you secure online access to check and monitor performance of your investments

How do I get access to the Client Portal?

When you opt into the Ongoing Service from Alexander Peter Wealth Management, your Wealth Manager will give you access to set up your online account on the Client Portal.

They will do this securely by email and mobile phone text.

If you accidentally lock your client portal or forget your password your Wealth Manager will be able to assist you.

If you opt out of Ongoing Service, you'll no longer have access to the Client Portal.

Once set up you will be able to:

- Review and monitor your portfolio(s) at your convenience
- Get instant real time valuations

For any assistance you will be able to contact your wealth manager directly to ensure you have access.

Ongoing service

Our ongoing service includes:

- A choice of differing levels of support depending on your needs
- A predetermined number of structured reviews per annum with your dedicated adviser
- Continued assessment of your circumstances and any changes to your plans that are needed
- Regular updates and information regarding your holdings
- Online access to investments via our client portal
- Administration support for existing policies
- Regular financial updates

Our review meetings

We will review your finances a set number of times per year depending on your Ongoing Service Level.

- In this review you will receive a full valuation of your policies, commentary on the markets, a summary of our advice to date and advice on any outstanding issues.
- You will be asked to confirm certain information prior to the review to ensure we are able to advise you appropriately.

Service levels

Comparison of ongoing service levels

	TS	FAS	WMS	WMPS
Statement of holdings	✕	ANNUALLY	QUARTERLY	QUARTERLY
24 hour access to Client Portal	✕	✓	✓	✓
Secure messaging and updates	✓	✓	✓	✓
Access to admin support team	✓	✓	✓	✓
Ongoing access to your advisor	✕	✓	✓	✓
Risk Profile Review	✕	✓	✓	✓
COST	**0.25%**	**Up to 1.00%**	**Up to 1.25%**	**Up to 1.25%**

Transactional Service (TS)

For clients who feel they want advice in certain areas but do not want ongoing investment reviews as part of the service.

Financial Advice Service (FAS)

For clients who want a long term, ongoing relationship with an adviser with regular updates and financial reviews to ensure that their needs and objectives are on target.

Wealth Management Service (WMS)

An advanced, priority service for clients who want a long term, ongoing relationship with an adviser, with quarterly portfolio updates and regular financial reviews to ensure that their needs and objectives are on target.

Wealth Management Plus Service (WMPS)

An advanced, priority service for clients who want a long term, ongoing relationship with an adviser, with regular updates and financial reviews to ensure that their needs and objectives are on target. These clients have multiple financial product and may have assets that need to be managed by multiple APWM offices. Clients typically have a minimum portfolio size of £750,000.

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Wealth Management

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