Acumen
Financial Planning

Complaints Handling Policy

Acumen Financial Planning is authorised and regulated by the FCA, FRN 218745.

Complaints Handling

We always endeavour to deliver the best possible service that we can, however, we recognise that there may be occasions where we have not met expectations.

Making a complaint

If you wish to make a complaint, please contact the Compliance Officer using one of the following methods:

Pauline Hamilton, Compliance Manager
Acumen Financial Planning
4 Kingshill Park, Venture Drive
Arnhall Business Park
Westhill, Aberdeenshire
AB32 6FL

Alternatively, you can contact us by telephone on 01224 392350 or email us at compliance@acumenfp.com.

Please provide us with as much information as possible about your complaint as this will help us investigate what has happened as fully as we can. Where possible, we hope to be able to resolve your complaint within 3 business days of receiving it, following which you will receive a summary response letter.

If the complaint is more complex or we need more time to investigate, we will send you a complaint acknowledgement letter within 5 business days, giving the name of the person handling the complaint and explaining the investigation process.

We will send you a Final Response letter within 8 weeks, in which we will report our findings and the decision we have reached.

In the unlikely event that we are unable to complete our enquiries within 8 weeks, we will write to you explaining our reasons for the delay and when we believe that we will be able to send a Final Response. This will also provide details of your right to refer the matter to the Financial Ombudsman Service (FOS).

If you are unhappy with our decision or the way we have handled your complaint, you have the right to refer the complaint to the FOS, whose contact details are below:

Financial Ombudsman Service
Exchange Tower
Harbour Exchange Square
London, E14 9SR

Tel:
- 0800 023 4567 (UK)
- +44 207 964 0500 (Abroad)

Email:
complaint.info@financial-ombudsman.org.uk

Website:
www.financial-ombudsman.org.uk

When we write to you with a Final Response or explaining the reason for delay, we will enclose a copy of the FOS explanatory leaflet.

A referral to FOS must be made within 6 months from the date of our final response letter, or they might not be able to help.