



Helping you to plan the future you want

Concise, impartial financial
advice from a friendly,
professional team.

ABOUT US

We are a company of suitably qualified Independent Financial Advisers offering unbiased and honest financial advice.

Collectively we have over 70 years experience on all areas of financial advice. Because we are completely independent we are able to research the whole market to source products and services, ensuring we provide you with the solution that best suits your needs.

We pride ourselves on delivering our financial advice in an uncomplicated, easy to understand, jargon-free manner.

We are quite simply - 'big enough to cope and small enough to care'.

DEVELOPING A PERSONAL SERVICE

We realise that every situation is different and every individual is unique. We have therefore developed a range of services which can be tailored to meet your specific needs, no matter how complex.

We work in partnership with you and look to develop an excellent working relationship that will evolve over time.

Ongoing fees will depend on the type of relationship you choose to have with us and will be discussed and agreed with an Adviser. Of course your circumstances may change over time and we will be flexible in the way we work.

Rest assured that however you choose to develop your personal service, our key principles - honesty, integrity, reliability and value will underpin our relationship at all times.

“We realise that every situation is different and every individual is unique”.

THE WAY WE WORK

Step 1

Introductory Meeting

An introductory meeting to fully explain how our service works. If you feel you can benefit from our service, we will work with you to fully understand your financial goals and objectives.

Step 2

Gather Information

Collate all relevant information on your existing arrangements, in order to assess your financial position.

Step 3

Develop a Plan

By working with you we will develop a Personal Financial Plan, by researching and analysing your situation and make specific recommendations.

Step 4

Implementation

We will take you through your financial plan stage by stage. It will set out specific and realistic recommendations designed to achieve your stated objectives over an agreed period of time. Together we will implement the strategies recommended in the Financial Action Plan.

Step 5

Ongoing Service & Relationship

Where an ongoing service is agreed, your Adviser will help you review your Personal Financial Plan to make sure it is on track with your objectives. Reviews will take account of any changes in your personal circumstances, financial market conditions and relevant legislation.

OUR RELATIONSHIP AND HOW WE GET PAID

We believe that you have every right to expect value for money from us and that's exactly what we constantly strive to deliver.

Our fees will depend on the initial level of service you benefit from most and the type of on-going relationship you require.

Generally speaking, we charge for our services on the following basis:

- No charge for the introductory meeting – we will bear the cost of this.
- A fixed fee agreed at the end of the introductory meeting, depending on the number of areas that require advice, i.e. pension, investments, mortgages etc.
- At the implementation stage product selection will of course depend on the nature of your Personal Financial Action Plan. Our fees will be a percentage of the amount being invested and/or a set implementation fee.
- Once your Personal Financial Action Plan is in place, we will agree an on-going service level and work closely together in line with your needs.

We look forward to working with you and to help you build a secure and prosperous future.

“Honesty, integrity, reliability and value will underpin our relationship at all times”.

*Simply call us on 01536 512724
or email us at:
enquiries@atawny.co.uk
to find out more*

www.atawny.co.uk

Independent Financial Advisers specialising in:

- Financial Planning
- Pre & Post Retirement Planning
- Inheritance Tax Planning
- Business Protection
- Life Assurance/Income Protection
- Mortgages/Buy to Lets/Re-mortgages
- Commercial Mortgages/Loans
- Equity Release/Home Reversion Schemes
- Lifetime Mortgages
- Investment Planning
- Pension Planning

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Aaron
Tawny

The logo for Aaron Tawny, featuring the company name in a bold, blue, sans-serif font. To the right of the name is a stylized yellow owl icon with large, white, circular eyes.