

CLIENT SERVICE STATEMENT

Our Commitment

To provide suitable Financial Advice for Insurance Products for our Clients in accordance with the Code of Professional Conduct for Financial Advice Services for Ethical Behaviour, Conduct and Client Care. We will strive to give you the right solutions and support that you need.

Treat Clients Fairly

We will always treat you respectfully and provide professional, prompt and friendly service while also considering your views, concerns and preferences.

Act with Integrity

We will build a relationship with you based on trust and integrity while doing what is best for you at all times.

Give Advice that is suitable

Once we have got to know you and your specific requirements, we will focus our efforts on seeking products or services that meet your needs and explain to you why we recommend any product or service.

Ensure that the Client understands the Financial Advice

Our communication will be clear and concise, and it will outline our discussions and agreements.

Protect Client Information

We will protect the information you give us, and only use it for the reasons it was collected.