What Do I Get For My Money?

1. The Plan Fee

The plan fee entitles you to ownership of the strategy and covers the cost of WFW's intellectual property, which is our experience and our expertise.

2. The Implementation Fee

The implementation fee covers the cost of accurate implementation. A good strategy poorly implemented can so often bring the whole strategy undone. We have a reputation in the marketplace as a firm that does the highest quality work. Many other professionals like accountants and lawyers refer their clients to us because of that reputation.

The people we employ here are the best in the industry. The implementation fee covers the cost of our staff and the professional responsibility we incur for implementing the advice.

3. The Williams Farrall Woodward Partnering Fee

This fee covers a range of services brought to you:

Staying focussed on your goals

A detailed review meeting is held 12-monthly to ensure things stay on track to achieve your objectives. Interim reviews are also conducted throughout the year at predetermined dates, providing other opportunities to stay focussed on your goals.

Minimising hassle

Our aim is to improve your lifestyle through the use of smarter strategies. However we also take the pain out of managing those strategies by handling all administration. This gives you more time to enjoy the lifestyle you are creating.

Working for you

WFW is entirely independent. We are not owned by any institution and we do not achieve our regulated status through any third party, so our advice is not tainted by conflicts of interest. Our strategies consider all available options that may improve your financial security, and improve your lifestyle. We work for you.

Considering all investments

Our philosophy states that a sound investment strategy must support a client's overall objectives. That's why we bring you a broadly based approach that considers all appropriate investments including commercial and residential property, direct shares, institutional managed investments, and even your own business.

Analysing what's suitable

We use research from a wide range of sources including Morningstar (for fund research), Aqueos (for product and plan information and comparisons), MBL (for mortgages – a truly vast database) and our in-house capability based around our client relationship management system that has integrated and comprehensive direct access to actual fund manager and insurer data. However we also do our own due diligence on one-off investments. No one has a monopoly on good ideas, and if you see something unique we can investigate it for you. This high quality research ensures we take the shortest path possible from where you are now to where you want to be in the future.

Managing your investments

We know how important it is for your 'critical capital' to really do its job. It's the money that is going to ensure you live life the way you want to, so it has to work. That's why we manage it using a scientific process that has stood the test of time. After all, your goals may change, or markets may change. Our commonsense approach to investing allows that flexibility.

Reducing costs

Where possible we use institutional (that is 'wholesale') investments to reduce the cost to clients. More pounds in your pocket mean faster results in achieving your goals.

Accessing unique opportunities

Because of our position in the market we obtain access to unique investment opportunities that are not readily available to the individual investor. Appropriate use of these investments adds value to your investment strategy, increasing your wealth and providing more lifestyle choices.

Making ourselves available

You have continual access to advice - be it by telephone, a chat over coffee, or a formal meeting to discuss a potential strategy. Good ideas wait for no one. Access to your adviser ensures that every opportunity is considered and, where appropriate, included in your strategy.

Researching the options

Creating the latest value-added strategies doesn't happen by accident. Constant changes to legislation create opportunities and threats that need to be investigated on your behalf. Strategies and investments are regularly analysed for client suitability. The results of this work are incorporated at each of your reviews throughout the year, accelerating the progress toward your objectives.

Keeping you up to speed

We engage in education with people one to one and via our seminars. Seminars are arranged throughout the year and provided at no cost to you. If you wish to bring a friend or family member there is no charge for their attendance. Keeping you informed provides you with peace of mind along the journey.

Providing depth of support

Our people are our greatest asset. Our business depends on the intellectual capital and experience they have built over many years. This depth of support exists to provide you with the best service throughout the year and to ensure that all your queries are addressed promptly and efficiently.

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Keeping track

To run our business today we must use the latest technology. The computer systems we use to model scenarios and track investments are the best in the industry. It is only by using the power of this technology that we can continue to add value to you and keep you on track to the objectives you have set for yourself.

Accessing a specialist network

Clients have told us they want a one-stop shop, but with the best advice. Since "like attracts like", we have developed a network that gives you access to the leading technical specialists in:

- Pensions
- Property
- Direct Shares
- Estate Planning
- Finance
- Specialist Investment Instruments
- General Insurance

This means that the best advice is only ever a phone call away. Access to such a network saves you time in seeking out other professionals to assist you in related financial matters.

The Results

As your partner in building wealth and security, we focus on ways that we can help you to live the life that you want to live. By engaging WFW and taking advantage of the ongoing partnering service, you assure yourself of regular financial checkups and access to new ideas brought to you by our team.

Choosing a financial partner is one of the most important decisions you will ever make. Take your time, choose wisely, and we hope that we can earn the right to work with you into the future.

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