

Mark J Morsley & Associates Ltd

What to expect from your Financial Adviser



Mark J Morsley & Associates Limited

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Authorised and Regulated by the Financial Conduct Authority No. 552440

Looking to protect, grow and nurture your wealth?



We can help you chart your path through life. By working together we'll try to ensure you are financially ready for every stage.

Your partner, every step of the way

We are driven by providing professional financial advice and building intelligent and trusted relationships.

Mark J Morsley
& Associates Ltd



WELCOME



Mark J Morsley, Managing Director

MJM Financial Management & looking after your plans

Enhancing client protection by setting higher and clearer standards

The fee that is paid to us from your pension or investment covers the work we undertake, on your behalf, as below:-

- Regular checking of the value of your plan.
- Secure storage of all documents that relate to your plans, availability of these on request.
- Full compliance with the Data Protection Act.
- Access to the MJM support team.

The fee is also gives you access to the following either on pre-arrangement or request:-

- A one-to-one meeting to discuss your pension or investment. This can include its performance, where you are invested and level of income to currently take or plan to take.
 - The frequency of the meetings can be agreed at outset and can be held at our offices, at your home or via online video (Zoom or Microsoft Teams). These are generally held annually.
 - Additional meetings may incur a fee that would be agreed prior to setting the time and date.
 - Analysis and updating your investment risk profile and capacity for loss.



PROVIDING PROMPT AND HELPFUL ASSISTANCE

Enabling and supporting clients to pursue their financial objectives



Although clients should have the autonomy to make their own decisions, we strive to create an environment conducive to them making informed decisions with our support and guidance.

By understanding each client's behaviours, we can give them easy access to all the details they need about a product or service.

This includes pricing, features, benefits, and any potential risks.

Using data to understand a client's needs and preferences allows us to tailor individual offerings accordingly. This enhances the client experience and empowers them to make choices that best suit their needs.

Educating our clients goes beyond just providing information. We always

ensure that clients understand the implications of their decisions. This could involve explaining how a product works or offering advice on how a service can be used effectively.

We encourage and welcome feedback from clients. This provides valuable insights and gives each client a sense of involvement and control.

Providing reliable client service is crucial. Our clients know they will receive prompt and helpful assistance if they encounter any issues or queries.

Using data to understand a client's needs and preferences allows us to tailor individual offerings accordingly. This enhances the client experience and empowers them to make choices that best suit their needs.

Financial planning is not a one-size-fits-all solution. What works for one person may not work for another. That's why we take the time to understand your needs before recommending solutions.



ADVICE FOR YOUR FINANCIAL FUTURE

Understanding your goals, planning for the future, and making informed decisions



Some of our relationships with our clients go back generations, but they all started somewhere. We would be delighted to hear from you and discuss the right approach for you and your family. From planning for retirement to investing or protecting and preserving wealth, we offer professional objective advice and solutions to get you where you want to be.

**Sound financial decisions follow
professional financial advice**

To discuss how to reach your unique financial goals - arrange a complimentary, no-obligation consultation - please get in touch with us.

Call Mark J Morsley & Associates Limited
on **+44 (0) 1206 392255** or email
info@markjorsley.com to request a call back.
Visit our website **www.markjorsley.com**

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