



# *Internal Service Standards Checklist*

# Internal Service Standards Checklist

Service Component % of FUA subject to a minimum of	(A) £ xxxx p.a.	(B) £ xxxx p.a.
Annual review	X	X
Annual review pack	X	X
Mid-year review (optional)	X	X
Unlimited face to face	X	X
Telephone & email access	X	X
Cashflow planning	X	X
Professional liaison	X	X
Portfolio construction	X	X
Portfolio management	X	X
IHT & Estate Planning Service	X	X
Priority response service (within 24hrs)	X	X
Second opinion service/sounding board	X	X
Remove the hassle service	X	X
Telephone call between review dates x 2 p.a.	X	
Telephone call between review dates x 1 p.a.	X	X
Cards for birthdays and special occasions e.g. retirement	X	X
Christmas cards	X	X
Christmas gift e.g. chocolates	X	
Targeted email communication x 4 p.a.	X	
Targeted email communication x 2 p.a.		X
Corporate hospitality	X	X
Annual client seminar	X	X
Lunch (at annual review meeting)	X	
Luncheon	X	X

  
 Part of Promoted Service Standard  
  
 Part of Non Promoted Service Standard

*Advise Better  
Live Better*