

Our commitment to you

We are completely committed to helping you achieve your financial and lifestyle goals. We want to take this opportunity to communicate our promise to you in detail.

We are backed by the vast resources and support tools of the wider Genesys Group, which in turn is backed by the strength and infrastructure of the Global AXA Group, one of the world's leading financial services organisations. This support helps us deliver our commitment to you.

Our commitment is to provide you with:

Security	Our firm is managed by the people in the office, and we work as a team to support you. The strength and backing of our licensee, Genesys, enables us to provide you with security, support and peace of mind.
Control	If we cannot demonstrate our value to you, by giving you the knowledge to make informed decisions that give you the level of control you desire, then we believe we shouldn't take you on as a client.
Tailored advice	We have access to technical specialists and a broad range of researched products that allow us to provide you with a tailored strategy. We always recommend what is appropriate for you and your life – at no time are we required to recommend particular products.
Outstanding service	We want you to live the life you love, so we will always put your interests first. We promise to take the time to get to know you and will make experienced, informed and responsive people available to you.
Professional standards	We are committed to continuous self-improvement and learning and will only ever provide advice in areas where we are qualified to do so. Our business operates in a highly regulated environment and we welcome regular Genesys audits to demonstrate the due care we give to our clients.
Value	We will disclose all fees and other forms of remuneration so that they are easily understandable. We are confident that our fees are fair and appropriate relative to the lifetime value we can demonstrate. They also provide us with the foundation to run a sustainable business, which enables us to continue offering innovative solutions to you and your family into the future.