



TREATING CUSTOMERS FAIRLY – The Financial Coach – Policy Statement

According to the guidelines laid out by the Financial Services Board, The Financial Coach and its employees are committed to upholding the fair treatment of all of our clients at all times.

We undertake to

- Gather information from you in order to obtain a clear picture of your financial circumstances and your needs, in order to provide you with the best possible plan to achieve your goals.
- Provide you with clear and transparent information about our services and products on offer, as well as any risks and costs involved.
- Recommend the best products to suit your needs and risk profile.
- Respond to any questions or queries you may have within a suitable time frame.
- Inform you of our Complaints process should you not be satisfied with any aspect of our Service.

Keep us updated

Should any of your circumstances change, please keep us informed in order for us to be able to tailor your investments in line with any changes.

Kindly contact us on 021 3003888 or cath@thefinancialcoach if you have suggestions for ways to improve our service to you.

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