



The Premier Partnership Limited
Your Family Office



**HOLISTIC FINANCIAL & RETIREMENT
PLANNING
LIFE & PROTECTION
CASH FLOW PLANNING**



**JARGON
FREE**



**TECHNOLOGICALLY
DRIVEN CLIENT OFFERING**

**DIGITAL
SIGNATURES**



**ACCESS TO PROFESSIONAL
MANAGERS AND PORTFOLIOS
DEDICATED SERVICE TEAM
LOW COST FUNCTIONAL
PLATFORM**



**NEWSLETTERS, BLOGS
& INVESTMENT REPORTS**



**THE WEALTH HUB - ONLINE
PORTAL
VALUATIONS
SECURE MESSAGING
DOCUMENT SHARING**

**CLIENT
EXPERIENCE** 
WE'RE HERE TO HELP

LET'S TALK

Communication on your terms

All of our communications are designed and created to be delivered in various formats. Some clients like hard copy documents in front of them, others prefer more digital routes; all of which we can accommodate.

Newsletters

Each quarter we design and create a newsletter for our clients, nothing is bought in from an external source. Our newsletters are created with our clients in mind, with the intention of providing useful articles and sharing relevant research findings.

Blog - perfect for on the go

Available through our app with alerts to keep you up to date with all the latest news you need to know about. Our blogs are written by the team with our clients in mind.

Website and App

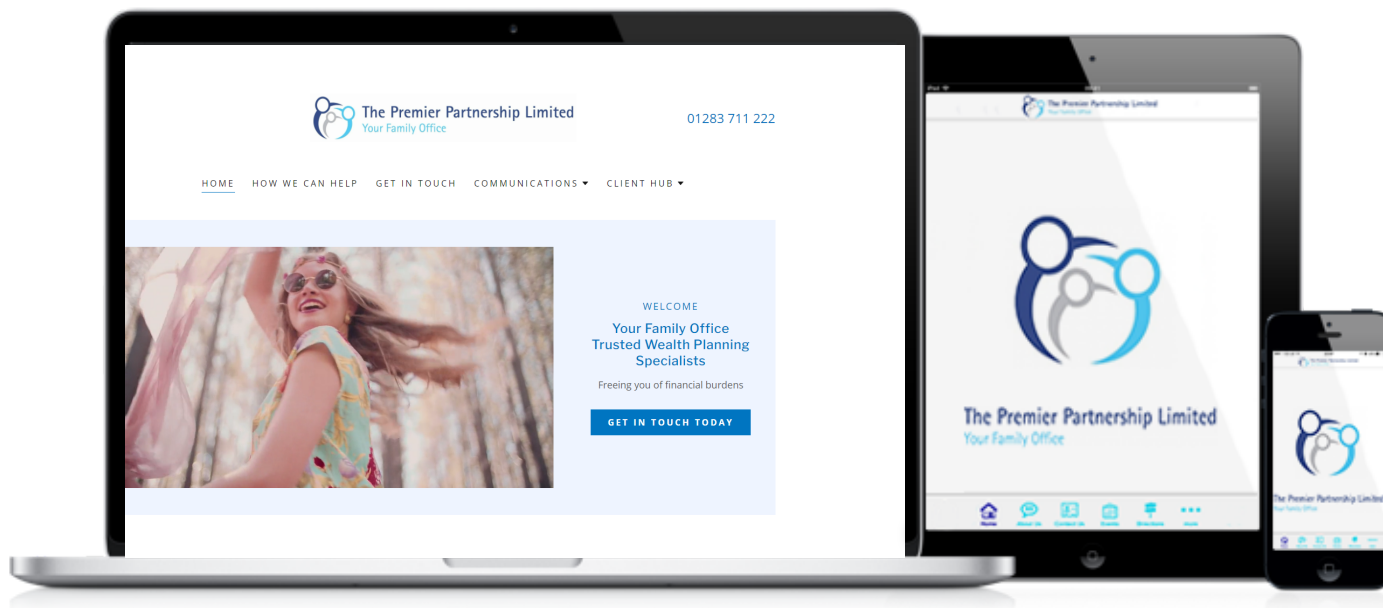
Our refreshed website is designed to be easy to navigate, yet extremely comprehensive. Everything can be found in one place including the blog, newsletters and investment reports.

Investment Report

Created inhouse on a monthly basis to keep you in the know about investments and other important information.

Portal - New Release!

Send and receive secure messages through our portal. The portal contains information on your Wealth. View and obtain up to date valuations and easily locate important documents such as; legal, tax, wills and probate



We have always been committed to delivering high quality communications, tailored to your preferences. These are detailed on the left-hand side of this page.

The main feedback we get from clients is how well we communicate important information to them, and we want to improve our communication further by investing more into our various channels.

Building on our commitment to client service we have introduced a client portal which we feel significantly enhances our client communication and the services we provide.

We want to encourage all of our clients to keep in touch with us on a regular basis through as many channels of communication that work for them. Please get in touch to discuss those communications which you'd like to receive, and we will put everything in place to deliver them to you on your terms.

As always the team and advisers are here and more than happy to catch up by phone or letter if you prefer.

Please feel free to contact us if you have any queries

Enquiries@premierpartnership.co.uk
01283 711 222

Introducing Our Client Portal

We are very pleased to introduce our client portal. Designed with you in mind, the portal contains information and documentation that is both relevant and specific to you. It can be accessed through a mobile, tablet, laptop or desktop.

The portal is easy to navigate and provides a secure line of two-way communication between you and your team in the office.

The portal allows us to provide you with an up-to-date system that contains your portfolio valuations. In addition you can use it to store securely sensitive documentation that forms part of your legacy and will help those managing your estate.

The financial services industry is highly paper based, and in our efforts to operate as a greener firm we see the digital delivery of client information playing a key role. This system facilitates the delivery of a truly digital service which is supported by your adviser and the team.

Documents can be completed online and signed via digital signature. We understand flexibility is key and there are clients who prefer paper. So that option remains. We hope however you will embrace this new technology with us and the benefits it provides.

We will continue to release new content through our blogs, investments reports, newsletters, webinars and videos – so stay tuned.

Consolidated Wealth

The portal has been designed to provide our clients with a complete and consolidated view of their wealth. This could include pensions, investments, properties, protection and savings accounts. We can even add physical assets such as cars, watches and artwork.

Up to date Portfolio Valuations

Our clients are able to view the overall position of their investments which comes from real time data. They can view where their portfolio is invested and its value. Data is easy to access and made available in a number of formats including charts.

Secure Messaging & Documents

The portal facilitates the ability to send and receive secure messages which can include attachments. Clients can sign and complete their annual review paperwork in the portal using digital signatures. In addition clients can use the portal to store and easily locate important documents such as their Wills.

Guided Tour

Aaron will provide you with a personal demonstration of the system, using your personal data making it relevant to you.

INTERESTED IN THE PORTAL?

We're with you every step of the way and will provide you with a personal and private demonstration of the system. For a demonstration, or if you have specific questions please contact Aaron Richardson. Aaron will set your account up to use the portal.

AARON'S DETAILS:

Aaron@premierpartnership.co.uk
01283 711 222

Disclaimer:- Live valuation data can only be provided to clients where their providers has live data links to our system. Not all providers have this.

Take a closer look

Portfolio Breakdown

We give our clients the ability to view graphs and asset allocation charts relating to their portfolios giving them a complete breakdown of their investment holdings.

Secure Messaging

Send and receive secure messages with attachments. We also store important documents and other confidential paperwork for easy access. Clients can also sign incoming documents through our portal.

Confidential storage and organisation of:

- Wills
- Probate
- Tax
- Reviews

BALANCE SHEET

MY ASSETS

£655,724

A combined sum of all your assets minus what you owe

5 INVESTMENT ASSETS

Funds, stocks and bonds

£705,724

Ferrari F50
Your Property
Artwork

1 LIABILITIES

Legal responsibilities

-£50,000

Car Loan

Investment assets (5)

Liabilities (1)

MANAGED

Description Owner(s)	Type Policy number	To Value
Your Property Carol Singer	Main Residence	£2
Direct Share Portfolio Carol Singer	Direct Investment	£ Last transaction 1 D Price updated Y
Ferrari F50 Carol Singer	Motor Vehicle	£2
Artwork Carol Singer	Artwork	£
Stocks & Shares ISA Carol Singer	Stocks & Shares ISA PCP123456	£ Last transaction 1 D

Balance Sheet

View all your portfolio in one easy screen. Balance sheet displays all of your pension, investments, saving accounts along with other physical assets such as property, jewellery, paintings, cars, and house contents.

Home Analysis **Balance Sheet**

ALL PORTFOLIOS

12th January 2020 – 12th January 2021

PORTFOLIO VALUE

£55,724

across 2 accounts

FUND PERFORMANCE

6.29% ↑

performance of underlying assets

CHANGE IN VALUES

£55,724 ↑

includes contributions and withdrawals



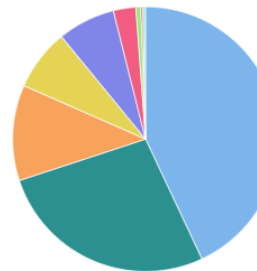
Percentage Value

Portfolios

Investments

Allocation

Asset class



MESSAGES AND DOCUMENTS

Compose

Inbox

Important only

Sent

To be signed

Wills

Tax

Probate (1)

Annual Review (1)

Sort by Created date (newest - oldest)

Filter by type All document types

Search subject here

o Hello!

16 Dec 2020 10:39

o Documents for signing

16 Dec 2020 09:58

o Documents for signing

1 Dec 2020 11:59

HELLO!

Created: 16 Dec 2020 10:39

Reference date: 16 Dec 2020

You can send messages to us securely through the portal.

Reply

Access for beneficiaries

In the event of your death we can arrange access to those responsible for your estate. This gives peace of mind that the right people will have access to the latest copies of your documentation.

Keeping Your Financials Secure

Our role is, not only to advise you and your family in all aspects of financial planning, tax and legal work but also to help, inform and educate you in respect of keeping your financial affairs safe and secure.

More so now than ever, there are some opportunists (criminals) who see this as a prime time to attack and scam people as more people move to online services.

Scammers are currently adopting old methods to try and obtain data from you. The main methods we are seeing are text messages and phone calls. The messages and calls do seem legitimate but we are asking you to be extremely vigilant at this time. Some of the messages look like they are from local authorities, the Government and in some cases the World Health Organisation(WHO).

The aim of these scammers (call operators) is to try and get you through to someone where they may offer free items, prizes even cash, with the sole aim of obtaining personal details from you. Failing this, if you press a button/key during the call it could connect you to an extremely expensive premium rate phone line. Always be aware that there are no get rich quick schemes, guarantees of investment performance etc.

If you receive anything that you are not expecting or are concerned about its legitimacy, please give us a call.



Some simple rules from gov.uk to protect yourself.

- Reject offers that come out of the blue
- Get the company's name and establish their credentials using the FCA's financial services register
- Beware of adverts on social media channels and paid for/sponsored adverts online
- Do not click links or open emails from senders you don't already know
- Be wary of promised returns that sound too good to be true
- Take your time to make all the checks you need, even if this means turning down an 'amazing deal'
- Do not give out personal details, (bank details, address, existing insurance/pensions/investment

details), seek financial guidance or advice before changing your pension arrangements or making investments.

As your advisers, we would never randomly send you investment recommendations or investments switches. We send out information and advice to you only with your permission. For your further reassurance an existing member of the team who you are used to dealing with will always introduce you to a new member of the team, if required.

If ever we decide to change a phone number, email address or website address, we would always notify you ahead of this change.

Sources – Ofcom and gov.uk

We are proud members of the Financial Vulnerability Taskforce

What is the Financial Vulnerability Taskforce? The Financial Vulnerability Taskforce is a newly created independent and inclusive representative body covering the personal finance sector. Supported by the Personal Finance Society, its ultimate purpose is to promote greater understanding of vulnerability, encourage appropriate behaviours and establish good practice amongst personal finance professionals in respect of people who find themselves in vulnerable circumstances.

What is its CHARTER?

At the heart of this initiative is a CHARTER which underpins the work of the Taskforce and sets out how professionals who commit to it are expected to work with customers in vulnerable circumstances. You can be confident when dealing with a financial planning firm or adviser which has made this commitment that they will use their best endeavours to provide you with a service that recognises your unique circumstances and delivers the same outcomes that you would expect if you were not in vulnerable circumstances.

A safe pair of hands when you need them most.

Vulnerability is something that can affect us all; through unexpected events such as illness, loss of employment, divorce or even the sudden acquisition of wealth through inheritance or a lottery win. While some health issues can lead to permanent vulnerability, fortunately in most cases it is a temporary phenomenon. But when it happens, you need to be assured that the professionals who support you fully understand its consequences and how best to continue to provide the highest quality service in these changed circumstance.

What to expect from firms and advisers who commit to the CHARTER

1. Making advice easier to understand. Recognising that many consumers will find it difficult to understand many of the technical and specialist concepts and terms used in financial planning, firms and advisers will go out of their way to explain things in an accessible way. They will only proceed once they are satisfied that their client fully understands the implications of the advice being given.

2. Placing your interests above all else. As a client, at all times your needs will take priority over the financial interests of the firm or adviser and they will always use their best endeavours to provide an appropriate, personalised service for all their clients.

3. Understanding how your circumstances might make you vulnerable. Firms and advisers will understand that vulnerability can be physical, mental, emotional or simply the result of a lack of understanding. Being dynamic in nature, it may be short-lived or longer term, sometimes permanent, transient, recurring or fluctuating over time and may be hidden. Firms and advisers committed to the Charter will act appropriately and with sensitivity in each case.

4. Not making assumptions about you. All clients will be treated fairly, regardless of their identity, age, gender, race, sexual orientation, disability, gender reassignment, religion or belief and they will guard against making assumptions about you.

5. Not labelling. you Using appropriate language is important. For example, adopters of the Charter recognise that vulnerability relates to circumstances and not to a category of person and will not seek to label you as a vulnerable person but someone who is currently in vulnerable circumstances.

7. Adapting processes and maintaining your confidentiality. If you are considered to be in vulnerable circumstances, you will be encouraged to recognise your vulnerability, safe in the knowledge that business processes and professional services will be adapted so that you do not suffer detriment at any point. You can also expect outcomes to be achieved that are at least as good as for those who are not in vulnerable circumstances. They will also maintain confidentiality and ensure behaviours are fully compliant with all relevant legislation.

8. Ensuring staff are knowledgeable and appropriately trained. Firms and advisers who commit to the Charter will make sure all members of their organisations deal compassionately, empathetically and effectively with those in vulnerable circumstances by raising awareness of vulnerability and by providing appropriate training in supporting those in vulnerable circumstances.

9. Taking appropriate action if you are in harm's way In those rare situations where it is recognised that a client in vulnerable circumstances may be in immediate danger of significant abuse or harm, or may need immediate support, action will be taken to mitigate the risks they face including contacting the appropriate authorities if necessary. Examples of abuse or harm include inappropriate pressure from a third party and scams.



A SAFE PAIR OF HANDS