WEBSTER ASSOCIATES

The future is always uncertain,

but working together you can be prepared.

Client Service Charter

Don't let life get in the way of your goals,
we keep our clients focused on achieving the right outcome for them

Life has become ever busier, and it looks set to continue that trend. It would be easy for us to simply take what you want at face value, and do as we're asked, but that would lead to the wrong outcome even if the advice was good.

We take the time to understand where you are in life, understand where you want to get to, and build a plan with you that helps you achieve what you want. This enables us to get under the skin of the problems you face and ensure we are assisting you to reach the best possible outcome, and you are fully prepared for any eventuality.

Our goal is to be there for our clients not just now, but for the decades to come. There when you need help most, building on your vision for your future.

As a valued client of Webster Associates, you have access to a comprehensive range of advice and a high standard of service. Our Client Service Charter sets out what you can expect to receive as a client of ours.

The tailored service we provide to you includes:

- Annual review meetings at least once per year or at a frequency to suit you
- The ability to speak to our Advisers by phone, email or zoom between review meetings
- The support of our highly qualified and experienced back office team
- Online access to your Wealth Account for 24 hours a day, via our website or the SJP App
- Annual Wealth Account confirming the values of your St. James's Place investments
- An annual Budget summary and webinar
- Access to SJP's E-briefing Service, providing topical financial news articles
- Invitations to client events and webinars
- Regular topical updates sent directly from our Practice

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