Emerald

Comprehensive wealth management solutions

Emerald clients typically have significant capital and strong financial knowledge. They are seeking proactive wealth management strategies that will help them to optimise their financial position. They enjoy market-related discussion and regular feedback on the progress of their investments, whilst remaining completely in control of their wealth and its management.

An Emerald client expects every key aspect of their financial planning to be catered for. This includes discretionary fund management and professional introductions in areas such as taxation, pensions and legal services.

Emerald includes the highest level of client support and face to face contact of all our service packages as well as opportunities to attend prestigious special events.

The Emerald Client Service

Annual review meeting	A complete review of your financial strategy The Crawford Consulting Financial Health Check
Ongoing strategy and review meeting	Three available each year To include a review of paperwork and financial offers
Unlimited face to face access to your adviser	Make ourselves available for meetings between your review dates
Unlimited telephone and email access to your adviser	Direct line: 01603 219742 Email: paul@crawfordconsulting.co.uk
Priority response service	Phone calls and emails returned within 24 hours
Foresight service	Proactive identification of investment opportunities or risks
Portfolio management service	Portfolio monitoring Rebalancing of asset allocation Portfolio valuations on request
Risk monitoring service	Regular reviews of your attitude to risk Regular assessment of the risk profile of your portfolio
Information service	Provide information on specialist areas such as self-invested personal pensions, enterprise investments schemes, venture capital trusts as appropriate Provide generic research
Second opinion service	Make ourselves available to consider new ideas from whatever source they may originate
Professionals service	Provide strategic updates to your other professional advisers Recommend suitable professionals as appropriate
Inheritance tax and estate planning service	Provide up-to-date information in relation to changes in legislation
Tax planning service	Supply end of year tax information if required Work in conjunction with your accountant and other taxation advisers if required
File maintenance service	Ensure essential records are kept up-to-date