




ON-GOING ADVICE SERVICES

Service	 Bronze <i>Pay per use</i>	 Silver <i>Automated Advice</i>	 Gold <i>Personal Service</i>
<p>Monitoring and supervision of investments <i>Your portfolio is reviewed and changes made to the asset allocation. This can involve rebalancing the portfolio, switching funds and taking profits from higher risk sectors.</i></p>	<p>£95 per hour</p>	<p><input checked="" type="checkbox"/> INCLUDED Yearly review conducted remotely</p>	<p><input checked="" type="checkbox"/> INCLUDED Quarterly reviews: can be remote or “face to face”, depending on location</p>
<p>Taxation advice when taking benefits <i>Identifying the most tax efficient way of taking benefits from some or all your investment bond.</i></p>	<p>£95 per hour</p>	<p>£40 per hour</p>	<p><input checked="" type="checkbox"/> INCLUDED</p>
<p>Assisting your beneficiaries <i>Axxis can work with your beneficiaries to ensure they inherit the proceeds of the investment bond quickly and efficiently. They may want to keep the bond, surrender some or all of it or assign it to someone else.</i></p>	<p>£95 per hour</p>	<p><input checked="" type="checkbox"/> INCLUDED</p>	<p><input checked="" type="checkbox"/> INCLUDED</p>
<p>Cashflow modelling <i>Plan and adapt to future needs and changes, consider key issues such as sustainability of income.</i></p>	<p>£50 per hour</p>	<p>£25 per hour</p>	<p><input checked="" type="checkbox"/> INCLUDED</p>
<p>Review of existing investments <i>This can include ISAs, pensions and investment bonds.</i></p>	<p>£50 per hour</p>	<p><input checked="" type="checkbox"/> INCLUDED</p>	<p><input checked="" type="checkbox"/> INCLUDED</p>
<p>Miscellaneous future advice <i>Including questions and queries where advice is required.</i></p>	<p>£95 per hour</p>	<p>£40 per hour</p>	<p><input checked="" type="checkbox"/> INCLUDED</p>
<p>Liaising with other professionals (ie Accountants , Solicitors) <i>Axxis can liaising with your solicitor or the executors of your estate when you die, and your accountant to ensure optimum tax efficiency.</i></p>	<p>£95 per hour</p>	<p>£40 per hour</p>	<p><input checked="" type="checkbox"/> INCLUDED</p>