

Our Service Undertaking to you is as follows:

We will;

1. Give impartial, independent financial advice
2. Act on your behalf at all times, not on the behalf of any other product or service provider
3. Be honest and transparent in our dealings with you
4. Supply you with written Terms of Business before engaging in any advice for you
5. Provide for you, in writing, a report or letter explaining reasons for any recommendations
6. Be qualified as an experienced financial planner
7. Be deemed financially fit and proper to conduct investment business
8. Be subject to ongoing examination of our fit and proper status
9. Seek to increase our own knowledge and professionalism by undertaking professional development
10. Have access to leading technology to assist in research and administration on behalf of clients
11. Provide you with access to any data held by Ruth Whitehead Associates on your behalf

TAKE A FRESH LOOK AT YOUR LIFE

Principal: Ruth M Whitehead BA Cert PFS
Ruth Whitehead Associates is authorised and regulated by the Financial Services Authority

