

# Customer charter

## Always putting the customer first

Very few advisers and even fewer large companies are willing to commit verbally to a service standard let alone put one down on paper, in keeping with our philosophy of care we are happy to publish our own charter.

## Wadham Financial Solutions promise:

- To respond to your initial or follow up enquiry within one working day of receipt.
- To treat you and your family with the utmost respect and courtesy.
- To always send your formal written communications by first class post.
- That if you book an appointment, we will always send you a confirmation letter (unless the appointment is booked for less than two days hence).
- That we will always provide you with the mandatory documentation.
- That we will always send you your follow up report, illustrations and Key Features Document either within five working days of the appointment /consultation, or within two working days following receipt of final underwritten figures (whichever is appropriate).
- To keep you informed about the progress of your application and/or investment on a regular basis.
- To always send you your policy documents within one working day of receipt.

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