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Treating Our Customers Fairly

OUR PRINCIPLES

The way we do business

- We will be open and straightforward with you and always conduct our business honestly.
- We want you to be happy to build a long term relationship with us.

Meeting your needs

- We will ask you questions about your needs and circumstances before we advise you.
- We will only recommend suitable products and services that you can afford.
- We will offer access to a wide range of products to enable your needs to be met.
- If we are unable to find a suitable product for you we will let you know.
- Before you accept our advice we will clearly explain the main benefits and risks to you.
- We will not charge you any fees for our advice or service.

HOW CAN YOU HELP US?

Your personal information

- Please provide as much information as you can on your income, outgoings and future plans.
- This will help us to recommend products and services which you can afford.

Understanding our advice

- Don't proceed until you are completely satisfied.
- Therefore, please let us know if anything we say is unclear or if any documents we show you are confusing.
- We will do everything we can to ensure that you understand our advice.

LISTENING TO YOU

- We may ask you for feedback on how we can improve our service to you and other customers.
- If you wish to complain we promise to handle your complaint fairly.