



## Solicitor Charter

### Symponia advisers promise:

- That we will always treat you and your clients with the utmost respect and courtesy.
- To respond to all initial referrals within one working day of receipt.
- That all communications to you and your clients, or their family will be sent by first class post.
- That, should we book an appointment with your client or their family, we will always send them a confirmation letter, and this will be sent the day the appointment is booked.
- We will always provide your client or their family with a personalised Terms of Business.
- To send your client or their family the follow up report, illustrations and appropriate Key Features Document within three working days of receipt of the appropriate figures.
- That we will keep them informed regularly about the progress of their application /investment.
- That we will always send policy documents to them within one working day of receipt.
- That all invoices (where previously agreed and appropriate) will be clear, timely and concise.
- To always keep you fully up to date with any advice, products or services that we are discussing with your client
- Your clients will always remain yours - we will only transact that business requested by you.