

# Our Client Guarantee

*At each and every stage of our relationship with you, we do everything possible to take away your concerns, exceed your expectations and give you guaranteed reassurance and peace of mind in your decision to use SBA Financial.*

*At every point, we want you to be 100% satisfied with the value and expertise you receive from our team.*

## When we meet...

The Discovery Meeting is designed to give you the opportunity to discuss your current situation, your worries and concerns as well as what you want to achieve with your pension & retirement. We are there to listen and provide input and advice to help you make the right decisions.

- It is important you feel that the meeting is a valuable use of your time, but if, for whatever reason you don't think you've had value for money; you'll receive every penny back, guaranteed.

## Your Advanced Lifestyle Plan...

Years of knowledge, weeks of analysis, hours of reading and pages of research are condensed and utilised to give you the most thorough and carefully, expertly considered financial guide. Your Advanced Lifestyle Plan is an extraordinarily valuable document, which can be implemented by you, another advisor or the SBA Financial specialists depending on your choice.

- We are so confident you will not find a more comprehensive Plan anywhere; we will refund 100% of its cost if you are not happy.

## Truly Independent Advice...

Many agents and advisors claim independence, but many are not truly free of suppliers, banks or brokers and some base decisions on high commission products. We are 100% independent and guarantee...

- To give you the choice to work with us on a fee or commission basis.
- To NEVER advise you on any product other than the one most beneficial for you.
- That we are not influenced by any other organisation and look at EVERY appropriate option and product available before making an unbiased recommendation.
- To advise you of every cost up front, so that you can decide if its value for money.

