BURFIELDS HOUSE

WEALTH MANAGEMENT

Client Service Charter

Welcome to Burfields House Wealth Management Ltd, Principal Partner Practice of St. James's Place (SJP), one of the UK's largest financial advice companies with £240.8 billion* funds under management.

We are committed to building and sustaining long term relationships based on trust, personalised service and the quality of both our initial and ongoing advice.

As a client, our focus is on you, your objectives and your priorities. We work hard to understand your individual needs and provide you with a genuinely bespoke advice service to meet your financial aims both now and in the future.

We also operate a "*do not leave any stone unturned*" approach to our review meetings aided by a comprehensive agenda sent to clients in advance to identify any changes in individual circumstances, needs and objectives. In this way we can ensure that our recommendations and advice remain "fit for purpose".

Your personal guarantee

Your financial future depends on our advice, so it is vital we get it right.

For added reassurance, SJP guarantees the suitability of the advice given by members of the St. James's Place Partnership, when recommending any of the wealth management products and services available from companies in the group.

For more information, visit www.sjp.co.uk/products

If you would like to know more about the Client Service Charter or if you have any financial questions or concerns you wish to discuss, please contact our office on 01580 211 211.

Burfields House Wealth Management Ltd, The Plain, Goudhurst, Kent, TN17 1AE
Website: www.burfieldshousewm.co.uk Email: burfieldshousewm@sjpp.co.uk

***figure at 30 June 2026**

What you can expect

Our first priority will be for us to get to know you. This is achieved through spending time with you to fully understand your personal circumstances and life objectives.

Taking time to get to know each other in this way builds trust and helps us to establish a long-term relationship with you. We will deliver our commitment to you through:

Review Meetings:

- Regular face to face reviews at an agreed frequency
- Interim & telephone reviews on request
- Emergency meetings when the need arises

Phone, Email & Mail Contact:

- All calls answered by our dedicated support team from our offices in Goudhurst, Cranbrook and Tenterden
- Telephone calls, emails and letters returned/responded to within 24 working hours

Wealth Accounts:

- Wealth Account Summary provided annually in January
- Interim/adhoc valuations available verbally or in writing on request
- Full online account access

Additional Bespoke Service & Communication:

- E-Briefing Service: You choose what you would like to hear about and how often from a Daily Market Update through to the Quarterly Client Magazine, The Investor Magazine, Half Yearly Report from the Investment Committee, to our monthly *View From the Plain* newsletter
- Budget Summary Reports and Tax Focus Cards
- Invitations to appropriate events to include family and friends

When You Really Need Us

- Death - When a client or one of their family dies, as part of our service we provide close support to the family advising them on what they should be doing next
- Loss of Capacity/Serious Illness - We will advise Attorneys and the family on what they can and should do as well as what they cannot or should not do. We can explain Court of Protection Orders where necessary
- Financial Difficulties - Assisting with resolution of financial difficulties for clients and their families
- Withdrawals help and guidance

What we expect from you

In order that our recommendations and advice remain "fit for purpose", we would request that you:

- Respond promptly to our communication
- Provide us with all relevant information
- Ensure we are always made aware of any changes in your circumstances
- Let us know your views regarding your ongoing advice requirements

Burfields House Wealth Management Ltd is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the group's wealth management products and services, more details of which are set out on the group's website www.sjp.co.uk/products.
The 'St. James's Place Partnership' and the titles 'Partner Practice' are marketing terms used to describe St. James's Place representatives.

Principal Partner Practice

St James's Place

SJP Approved 04/08/2026