

# TREATING SACRE CUSTOMERS FAIRLY

We have embraced the Financial Conduct Authority 'Treating Customers Fairly' principle and this empowerment forms part of our ethos and culture and is at the forefront of our recommendations.

We believe that Treating Customers Fairly is about delivering a fair outcome to our clients whilst offering a first class business service. Our Vision & Purpose statements follow:

## **OUR CORE PRINCIPLES ARE:**

- We will be open and transparent in the way we deal with you
- We will not place our interests before yours
- We welcome customer feedback on a regular basis
- We work to a transparent service and remuneration schedule
- We encourage all our staff to further their professional development
- We will communicate clearly and without the use of jargon
- We will inform you of our charges before undertaking any work for you
- We will deal with any complaints promptly and fairly

## **WE LOOK AT ALL AREAS OF OUR BUSINESS ON A REGULAR BASIS TO ENSURE THAT:**

- Clients can be confident that they are dealing with a firm where the fair treatment of customers is central to our firm's culture
- We consider our clients when promoting new services and products and ensure that it is relevant to them
- Our clients are provided with clear information and we keep them informed before, during and after the point of purchasing financial products
- Where advice is provided, we take time to understand our clients' situation and ensure that our advice is suitable and appropriate
- We meet our client's expectations, providing them with a level of service and products that are of an acceptable standard
- We will ensure that our clients can switch providers, change products, surrender policies and make any complaints without undue barriers

## VISION & PURPOSE STATEMENT

Sacre Associates was founded by Robert Sacre in 1986 in Chelmsford to provide Independent Financial Advice to Individual and Corporate Clients in the South East of England.

Following steady expansion over the years through client recommendation, referrals from Professional Connections and careful acquisition of other IFA Practices, Sacre Associates was significantly strengthened in 2006 with the admission of four of the existing long standing management team as Partners. At the same time the firm converted to a Limited Liability Partnership.

We strive to build long standing relationships with our clients through providing a professional, personal and friendly service.

We value our staff and endeavour to offer a pleasant and flexible working environment where each individual is encouraged to develop and reach their potential.

We aim to maintain our position as one of the largest privately owned IFA Companies in the region and to further expand our three Corporate Pension, Wealth Management and Mortgage Divisions.

We strive to ensure Clients will value our integrity and have complete trust in the service which we provide.

We want our Staff to enjoy working in a friendly and caring atmosphere, to be fulfilled in their work and to feel appreciated. We aim to provide opportunities for training and development to enable our people to maximise their potential.

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