

On demand service

A tailored, regionally based advice service from highly qualified financial planners and support teams

We take our responsibilities to you seriously and aim to work with you and your other professional advisers to deliver a service that is the most appropriate for you.

For any advice or service we offer, we will:

- Communicate with you in a way that is clear and easy to understand.
- Give you the information you need in order to reach an informed decision.
- Be considerate and helpful at all times.
- Treat you fairly.

Our on demand service is suitable for those who:

- Wish to take advice on their financial planning requirements on an ad hoc basis.
- Have simpler arrangements that do not specifically require any automatic ongoing service.
- Do not require annual reviews, valuations or newsletter and investment updates.

What initial and ongoing services will I receive?

Initial services

- We will carry out an in-depth review of your circumstances and gather and analyse personal and financial information about you and your aims and objectives.
- We will provide you with a detailed report, setting out our recommendations and, with your agreement, arrange the implementation of the recommended solutions.
- We will establish you as an On Demand client on our records and hold and maintain details of your circumstances and plans.

Ongoing services

- You will not be provided with any ongoing service. As an On Demand client, we will only provide the agreed initial financial planning and implementation service.
- If you ask us to undertake additional work in the future, we will agree the associated fees with you before we start that work.

What will it cost?

The cost of your initial meeting will be met by Mercer Financial Planning. We will then agree the best route forward for you and send you a detailed engagement letter setting out the service to be provided and the costs before we begin any work for you. An overview of our typical charges is contained in our Terms of Business.

If you subsequently decide that you would benefit from an ongoing service from us, we can arrange this subject to paying the appropriate fees, a list of which can be provided upon request.



Mercer Financial Planning is the specialist financial planning arm of Mercer UK, and we have helped thousands of individual clients develop and manage their financial plans. We form relationships based on understanding, trust and collaboration. We work to meet your financial goals and financial needs in the years to come.

The value of investments and the income they provide can fall as well as rise, and there is no guarantee that you will get back the original amount invested.

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To discuss your specific requirements, please contact your usual Mercer financial planner

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