

OVERVIEW

CLIENT COMMUNICATION

The Hub

Our website – your starting point for all communication

All communications are channelled via our website and this is your starting point whatever service you are looking for. If you want to log into The Personal Finance Portal (PFP), view your documents on PaperCloud, book an appointment, engage in Live Chat, log in to our Life Goals site, or any other service, our website is the place to start.

Secure Messaging

Most clients use the secure messaging facility from their account on the Personal Finance Portal (PFP) because this is the quickest and the most efficient way of communicating with us. They appreciate the security and that all messages are stored permanently for future reference. Please note that for your security withdrawal instructions or other material changes to your account can only be accepted if sent by secure message.

Appointments

When you would like to talk by phone or arrange a meeting, go to our website and click the 'Schedule an Appointment' button. This gives you the option to choose who you want to speak to and whether you want a telephone conversation, an online meeting with or without a screen share, or a face to face meeting. You have immediate access to our diaries, and you can choose up to three times which are the most convenient to you. When we receive your request, we will confirm as soon as we can.

Please note while we love to see you we arrange all meetings by appointment only because we do not have the capacity for drop-in meetings.

Email

The GDPR regulations introduced in May 2018 forbids the use of email for sending private or confidential information. Therefore, email is only used for general communications or to inform you that a secure message or document is waiting for you on The Portal. If you want to send us a message secure messaging will always provide you with a faster response because emails must be logged, filed, and allocated, which may cause some delay.

Telephone

Our telephone reception service will take your messages on Monday to Friday from 8.30 a.m. to 6.00 p.m. and your message is relayed to all of us so that it can be dealt with as soon as we become available. Please leave the number that you would like us to call and the best times to call you. Calls to mobiles are diverted to reception if we are busy.

Clients usually find that using secure messaging or booking a time for a call is more convenient than leaving a telephone message. Please note that because we rarely receive voice messages they are checked infrequently.

Live Chat

A live chat service is available on our website where you can send a message and get an immediate reply on Monday to Friday from 8.30 a.m. to 6.00 p.m. Outside of these times you can leave a message which will get a response the following day.

Text and Fax

While these services are not used as much as they once were, they have been retained for our clients' convenience.

Our dedicated text line 0780 000 0208 allows clients to send texts which we all receive as emails and it allows us to use email to reply to your text.

You can send a fax to 0121 554 7444 which we will receive as an email.

Post

Our preference is for you to scan and upload documents to your account on PFP however if you send us items by post, please use our Freepost address as below. Please write exactly as written.

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