

# YOUR FINANCIAL REVIEW

## ONGOING SUITABILITY REVIEW COMPLETED

**Your ongoing suitability report has been prepared and is now available for you to view. If there is anything that you would like to discuss, please get in touch.**

It is an FCA / MiFid requirement that we review your investments annually and we will contact you again at about the same time next year to complete another review. If your circumstances change significantly in the meantime and you think that this might affect your investments it is your responsibility to let us know.

For your clarification the full set of review documentation is as follows:

- 1. Your ongoing suitability report**
- 2. Your investment performance statement**
- 3. Your provider statement which includes a full breakdown of fees and charges (received direct from your provider)**
- 4. Our EDVOA statement which demonstrates the value of our advice**
- 5. Our illustrative breakdown of the services provided for the fees paid.**

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For more information, call: **0121 554 4444** or email: [enquiries@interface-ifa.co.uk](mailto:enquiries@interface-ifa.co.uk) [www.interfacefinancialplanning.co.uk](http://www.interfacefinancialplanning.co.uk)