

Our Ethos



Established 1999

For People Who Care

For more detailed information about Avalon and our products, visit our website.

You can also download all product documents.

Contact Us

We will be delighted to answer any questions you may have.

[Email - enquiries@avaloninvestment.com](mailto:enquiries@avaloninvestment.com)

[Phone - 01666 501710](tel:01666501710)

Avalon Investment Services Limited
2 Market Place
Tetbury
Gloucestershire
GL8 8DA

Avalon Investment Services Limited is authorised and regulated by the FSA.

Governed by FSA Solvency Margins.
Covered by The Investors Compensation Scheme
Registered
Number:3792386 England

At Avalon we care about your clients and constantly strive to give you and your clients the best service possible.

We do this by

- ★ knowing our IFAs personally which means that when you contact us we understand your needs immediately. We pride ourselves on speed of response saving you time and ensuring your clients get a superior and quicker service from both us and you.
- ★ offering you the widest choices of funds so that whatever fund you're looking for, whatever your criteria we are able to get it. Plus, we can immediately re-register clients' existing assets on to our platform so you are earning commission straight away.
- ★ providing a secure and stable environment for your clients' investments. Avalon is an independent company and our Open Architecture Wrap has been in place since 1999 so we have a proven history.
- ★ having an effective administration team and our testimonials prove it. This was written by an IFA *"from my own viewpoint, I believe we get a very good service from Avalon - friendly people, quick to respond, helpful and prepared to offer more than is requested if they feel it will be of benefit to me or the company. I also find the site covers most of what I want/need to know - and certainly more than other sites, which has to be the yardstick, in reality"*

What our clients have said about us.....

As part of our commitment to Treating Customers Fairly we send a Customer Feedback Response Form with our 6 monthly statements and ask, 'Do you consider Avalon to have any weak points?' Here are just some of the many positive responses we have received:

- | | |
|----------------------------|--|
| <i>Mr S, Chepstow</i> | <i>..... I have found no weak points and have never had to raise queries on my investment with my IFA, keep up the good work</i> |
| <i>Mrs S, Altrincham</i> | <i>..... None, your statements are always clear and helpful</i> |
| <i>Mr B, Buckfastleigh</i> | <i>..... I have always been very impressed with all aspects of the service</i> |
| <i>Mr B, Royston</i> | <i>..... None, generally a great service!</i> |
| <i>Mr W, Ross on Wye</i> | <i>..... From my experience as a small investor, you have no weak points, thank you</i> |
| <i>Mr M, Cardiff</i> | <i>..... I am very satisfied with the way my small investment is handled</i> |

Make sure your clients are as happy

For further information see our website www.avaloninvestment.com or contact us on 01666 501710 – enquiries@avaloninvestment.com. We will be delighted to answer any questions you may have.



What we can do for YOU

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Our service complements our ethos. We want to give you and your clients a great service to help you run your business.

The 'Personal' Wrap Service – what Avalon can do for your business. Like you, we value our independence and customer loyalty. Here are just a few ways we make life easy for you:-

- ★ Our reputation has been built, above all, on our personal level of service. It's what you want and it's what gives us the edge over other platforms. We provide a personalised back office solution for clients' investments with no call centre. We are committed to bringing you information as and when you need it and our dedicated team are always on hand. We want to find out your personal requirements and will provide solutions to meet your business needs.
- ★ You can choose from one of the widest choices of funds, which means you save time looking for alternatives. All eligible funds in the market place, including newly launched funds will be available to you.
- ★ Avalon is a totally independent company that deals solely with IFAs. With over a 10 year proven history we offer security, experience and stability for your clients' investments. We already comply with RDR and of course, take a strong view on Treating Customers Fairly.
- ★ Your clients will get great value for money with a highly transparent charging structure. There are no charges on fund switches or cash redemptions and we have negotiated significant discounts with the vast majority of fund managers. You get to choose your own commission rates.
- ★ You can ask us to put fund models together to reflect your investment philosophy and client risk profile in conjunction with Minerva Fund Managers or any other discretionary fund manager of your choice. We already have 5 SOCIALLY RESPONSIBLE fund models and a model specifically constructed to provide clients with a MONTHLY INCOME.
- ★ You can have regular service meetings at your office to review our administration process and how we can improve it for you. We also offer marketing support by producing branded literature you can use as a mailshot to your clients.

The best solution for all your back office needs

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