

Talis IFA: Due Diligence Summary

Talis Financial Advisers Ltd

Our firm was established in 1991 and provides financial planning and investment management services to both private and corporate clients. We also work closely with other professional firms, so as to be able to offer clients a comprehensive professional service. We are listed in the SIFA Directory of Professional Financial advisers, which is endorsed by the Law Society www.sifa-directory.info

Our business status

We are fee-based, whole of market and independent of any external influence, which means that our advice is conflict-free and provides access to the whole of the relevant universe of financial solutions, enabling us to focus on what is right for our clients, whether or not this might involve any financial product or investment.

Our business specialisations

Among our business specializations are investment for pension funds, trusts and private clients. Treatment of pensions and other financial assets on divorce; financial solutions for estate planning, care fees planning and advice to the elderly as well as investment of personal injury awards.

Our advisers' qualifications

The following are among our qualifications attained by members of our team which are relevant to our work with solicitors: Chartered Financial Planner, Pension transfer qualification, Long Term Care qualification.

Our investment philosophy

Our investment approach centres on achieving diversification and the minimisation of risk by allocating funds between different asset classes – principally UK and global equities and bonds, property, commodities, structured products and cash. According to market conditions, we utilise both collective investment funds and passive investment media and are able to provide our clients with instant on-line valuations. When appropriate, particularly in relation to larger portfolios, we work with external discretionary portfolio managers who satisfy our rigorous selection criteria

Our insurance

It is a regulatory requirement that all independent financial advisers carry professional indemnity insurance. Talis is covered for £1,850,000 in aggregate. Our current insurer is Liberty Mutual Insurance Europe SE. Our PI certificate is available upon request.

Testimonials:

<http://talisifa.com/testimonials/>

How to contact us

Our Head Office is at Stoke House, Church Road, Ashford Kent TN23 1RD
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We also have a London office.