

AUTUMN  
2021



Broadway  
Financial Planning

# BROADWAY BULLETIN

## WELCOME TO OUR AUTUMN NEWSLETTER

Having enjoyed the most wonderful summer's day when we entertained a number of clients here at the Farncombe Estate a month ago, it now feels as though Autumn is quickly approaching.

We are delighted that the office is now fully open to meet clients and can adapt to changing needs as required. I think both staff and clients agree that meeting face to face to discuss your goals and needs is still the best way to organise your financial affairs, although we are grateful that "Zoom" got us through the most challenging times.

As well as dealing with the changing Covid requirements, we've been spending a lot of time reviewing the investment strategy and ensuring this remains robust for the future. We have recently engaged the services of an external research consultancy to help us assess the continuing suitability of investments and this may result in changes for some clients where we feel improvements can be made. We continue to maintain our key criteria of low cost and diversified portfolios but are moving away from the more "active" element of investment management where we have found that performance has not always justified the extra cost. We will be writing to all our clients separately who we feel should be considering changes.

We have also been reviewing our fee arrangements having deferred this since January 2020 and will be writing to all our clients with details of any changes. We hope you will find our services continue to offer you value for money and the level of expertise you've always enjoyed.

We are now looking forward to the new "school term" which for us means new opportunities for professional learning, conferences and award ceremonies. We'll keep you posted of any developments but, as always, please contact us if you require anything further.

Keri Carter, CFP™  
CERTIFIED FINANCIAL PLANNER™ Practitioner



## RETURNING TO NORMAL

Not wanting to speak too soon but life does feel like it is starting to return to some kind of normality (whatever that may be). At BFP we are all back in the office full time and welcoming clients back for meetings. The extra precautions we adopted due to the pandemic are still in force to a certain extent. If you are at all nervous about visiting us, we are still wearing masks if you wish us to do so and our cleaning procedures are still in place.

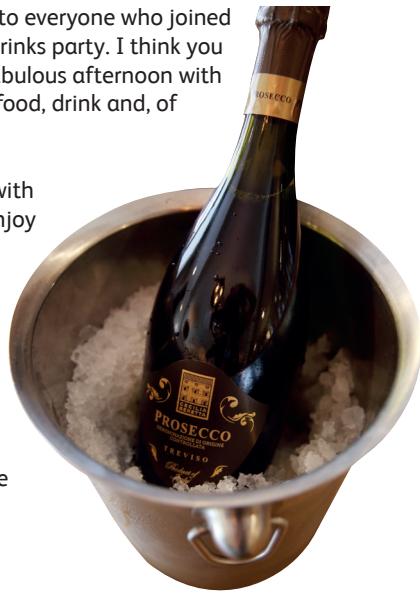
If you have any questions about this at all please do not hesitate to call. We hope to see you soon.



## SUMMER DRINKS PARTY

Thank you so much to everyone who joined us for our Summer drinks party. I think you will agree it was a fabulous afternoon with great conversation, food, drink and, of course, the weather!

To be able to meet with everyone and just enjoy catching up was certainly a welcome change from recent months. As always, *The Fish* was an amazing venue and we hope to be back there again soon for future events. Cheers!



## CLIENT SURVEY

In 2018 we asked our clients to complete a survey so we could measure how we were performing from their perspective. The results of this survey were really encouraging and we were very grateful for some of the lovely comments we received.

We try to do this kind of survey every few years so we will be sending one out in the next couple of months. We would be grateful if you would complete this survey and be as honest as you can. This feedback helps us to develop our policies and procedures to ensure a seamless experience for clients both old and new. Thank you in advance for your participation.



BAD NOT GOOD GOOD VERY GOOD EXCELLENT

## FINANCIAL VULNERABILITY TASKFORCE

Vulnerability comes in many shapes and forms and affects people of any age or situation. At BFP we are passionate about providing the best service we can to all of our clients, taking into account any vulnerabilities there may be. Finances can be confusing for many but if you are vulnerable it can cause a lot of uncertainty and upset. As part of the ongoing work we do with vulnerable clients we have signed up to the "Financial Vulnerability Taskforce". This has been formed by the Personal Finance Society. The taskforce is an independent body covering the Personal Finance Sector whose purpose is to promote greater understanding, encourage appropriate behaviours and establish good practice in respect of consumer vulnerability. For more information on the role of the taskforce please visit: [www.fvtaskforce.com](http://www.fvtaskforce.com)

Financial  
Vulnerability  
Taskforce

**A SAFE  
PAIR OF HANDS**



## SOCIAL MEDIA

Just a reminder that we are regularly posting tips and news articles on Facebook, Instagram and Twitter. Please like or follow us to keep up to date with our news and views.

Facebook @broadwayfp  
Twitter @BFP01  
Instagram @  
broadwayfinancialplanning



## WEBSITE

It has been a while since we launched our new look website. If you haven't visited it yet, why not take a look? In the news and views section we have a library of articles we have written on subjects such as planning for retirement, money saving ideas and the effect of Covid-19.



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