

How To Work With Us To Get Maximum Value For Your Investment

Here are some tips to help you to get the maximum value for your investment with us.

- 1. Tell us what your goals and objectives are.**
This enables us to suggest ways to achieve these and monitor your progress.
- 2. Tell us the services you require.**
If for any reason some of your needs are not being met, let us know so that action can be taken.
- 3. Ask for a systematic review of your entire financial situation.**
Let's identify the things we should be working on together.
- 4. Tell us about your likes and dislikes and how service can be improved.**
Many improvements we make here at Sygnum Financial Services are a result of client feedback.
- 5. If you have any queries or concerns - ASK.**
We are only too happy to invest the time with you.
- 6. Keep us informed. If you are contemplating a transaction or a change that will have financial implications - tell us.**
We can suggest ways to structure the arrangements to achieve the best results. We also will assist in documenting the arrangements, particularly for tax purposes.
- 7. Be prepared to pay for quality advice. Regular involvement in your financial affairs, particularly compliance services, makes us well acquainted with your situation.**
This enables us to provide you with ideas, budgets and other proactive services that will assist you and maximise the investment you have made in dealing with us.
- 8. Participate in the seminars and discussion groups that are organised.**
We run courses in many areas, such as running a better business, improving service and understanding financial statements. Many of these are conducted at little or no cost and will provide you with information you can use. It also provides the opportunity to network with other clients and share ideas.
- 9. Expect us to do more than just your compliance work.**
Filling out forms for the government does not give us much opportunity to add value.
- 10. Be receptive to new ideas.**
We work hard to keep up to date with the latest changes and to improve our capabilities to serve you. Listen to how new services might be of benefit to you - our suggestions are made with your bottom line in mind.



Your password to excellence