

### Treating Our Customers Fairly

Eureka deal openly and honestly at all times and behave with confidentiality, to give you correct advice and information to enable you to make informed decisions, and to honour any promises and representations we make.

#### We will do this by:

Ensuring we have accurate information through fact-finding to ensure we know you and understand your circumstances.

Clearly identify your needs and deal with those that are a priority, in a clear, concise and fair way.

Discuss all your options and ensure we disclose clearly all key facts.

Recommend solutions within your budget and use our expertise to match products to your needs.

To do what we promise in terms of advice and service in a timely, clear and concise manner.

*Experts*  
*Understanding your needs*  
*Reliable*  
*Experienced and*  
*Knowledgeable with the right*  
*Advice for you*



Eureka Financial Solutions is an appointed representative of Openwork Limited which is authorised and regulated by the Financial Services Authority

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**Openwork**  
Approved representative of Openwork Limited which is authorised and regulated by the Financial Services Authority.

### INVESTMENTS & PENSIONS MADE SIMPLE



### FINANCIAL ADVICE YOU CAN RELY ON



Trade names of Eureka Financial Solutions

**FOXALL**  
FINANCIALSOLUTIONS

**MELROSE**  
MORTGAGESOLUTIONS

## Investments & Pensions made Simple

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With so many options, how do you choose the right one for you?  
We've made it easy.

The basis of investment is using money to make money. And if we're honest, the idea of having more money appeals to almost everyone.

**So why don't more people invest?**

Well, the sheer choice available can make investing seem incredibly complicated, even for people who've done it before. At Eureka Financial Solutions we can make investing your money simple and straightforward.

Our approach to investment advice is based on an understanding of your needs and how much risk you're prepared to take. We can introduce you to worldwide investment opportunities from some of the UK's leading fund managers. So wherever you decide to invest, you can be sure your money will be in professional hands.

**Pensions made simple...**

Having decided when you want to retire, you should next look at how you'll want to live. Think of it as a permanent holiday, perhaps?

A rule of thumb might be to aim for an income of a half to two-thirds of your current one - adjusted for inflation and set to keep pace with it in retirement.

Consider what you'll be doing. Will you be taking more holidays or pursuing an expensive hobby? The chances are, you'll want to carry on living the same standard as you do now.

**Talk to one of our advisers today and open the door to a better deal.**



## Investments & Pensions made Simple

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### Savings

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Would you like to save on a regular basis within a tax efficient environment, then talk to us about Individual Savings Accounts. We can also help with regular savings for your children.

### Investments

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Do you have a lump sum to invest but don't know what to do with it? Then talk to us about the options available through Openwork.

### Pensions

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If you need some advice on your existing pension or you are looking at starting one for the first time please call us.

### Retiring Soon?

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Talk to us about the options available to you when your retirement date is looming. We have a range of products and services which we can access through Openwork.

Tax concessions are not guaranteed and may change.

