

Fedelta is dedicated to quality of service and in pursuit of excellence we have introduced this Client Charter.

Our clients can expect:

- To be treated in a professional and polite manner at all times
- To receive a prompt and concise response to correspondence
- To be kept informed of relevant news via our website and, if necessary, by email or letter
- Transparent charges for the services provided
- Direct access to your dedicated team - A Director heads up every team
- Us to work with the best professional partners when expertise is required
- Us to act with integrity and in what we believe to be your best interests within the law
- Confidentiality in all personal/client related matters (except information required to be disclosed by law)
- Us to communicate for as long as is necessary on new structures before our charges commence to ensure that everyone involved is fully conversant with the services Fedelta will be providing
- Appropriately qualified staff that have the necessary skills to professionally handle the services required.

We expect our clients:

- To be courteous to your team at Fedelta
- To remain in contact with us and provide us with up to date 'know your client' documents when requested
- To inform us of any changes in personal circumstances
- To inform us if you have a problem
- To give adequate notice of impending transactions that involve the client structure
- To understand that the trustees/directors are required to act in the best interest of the beneficiaries/shareholders
- To understand that professional advice may be required before the trustees/directors can adequately make decisions involving the assets of the structure
- To take confidence in the knowledge that your structure is well-managed by expert administrators.



**Please read our Terms and Conditions of Business, a copy of which can be obtained upon request.
This Charter does not form part of our Terms and Conditions of Business.**

a different class of provider



Call: +44 1624 622331 **Email:** mail@fedelta.com **Web:** www.fedelta.com

Fedelta Trust Limited is licensed by the Isle of Man Financial Supervision Commission.
Fedelta Pensions Limited is registered with the Isle of Man Insurance and Pensions Authority as a professional Retirement Benefits Schemes Administrator.