



about our services

Martyn Green
Independent Financial Adviser

Green Financial Solutions
48 Montrose Road
Sheffield, S7 2EF

Edition: January 2008

1. The Financial Services Authority (FSA)

The FSA is the independent watchdog that regulates financial services. It requires us to give you this document. Use this information to decide if our services are right for you.

2. Whose products do we offer?

Investment

- We offer products from the whole market.
- We can only offer products from a limited number of companies.
- We can only offer products from a single group of companies.

Insurance

- We offer products from a range of insurers for Life Assurance, Critical Illness, Income Protection and Private Medical Insurance.
- We only offer products from a limited number of insurers for Accident Sickness & Unemployment, and Home Insurance.
Ask us for a list of the insurers we offer insurance from.
- We can only offer products from a single insurer

3. Which service will we provide you with?

Investment

- We will advise and make a recommendation for you after we have assessed your needs.
- You will not receive advice or a recommendation from us. We may ask some questions to narrow down the selection of products that we will provide details on. You will then need to make your own choice about how to proceed.
- We will provide basic advice on a limited range of stakeholder products and in order to do this we will ask some questions about your income, savings and other circumstances but we will not:
 - Conduct a full assessment of your needs;
 - Offer advice on whether a non-stakeholder product may be more suitable

Insurance

- We will advise and make a recommendation for you after we have assessed your needs for Life Assurance, Critical Illness, Income Protection, Accident Sickness & Unemployment, Home Insurance, and Private Medical insurance.
- You will not receive advice or a recommendation from. We may ask some questions to narrow down the selection of products that we will provide details on. You will then need to make your own choice about how to proceed.

4. What will you have to pay us for our services?

Investment

- Before we provide you with advice, we will give you our keyfacts guide 'about the cost of our services'.
- We will tell you how we get paid, and the amount, before we carry out any business for you.

Insurance

- A fee of £500 for Life Assurance, Critical Illness, Income Protection, Accident Sickness & Unemployment, Home Insurance, and Private Medical insurance.
- No fee for Life Assurance, Critical Illness, Income Protection, Accident Sickness & Unemployment, Home Insurance, and Private Medical insurance. We will be paid by commission from the company.

You will receive a quotation which will tell you about any other fees relating to any particular insurance policy.

5. Who regulates us?

Green Financial Solutions is an appointed representative of Unleash Advice Partnership Limited, Unleash House, 14 Gander Lane, Barlborough Links, S43 4PZ is authorised and regulated by the Financial Services Authority. Unleash Advice Partnership Limited's FSA Register number is 473157

Unleash Advice Partnership Limited's permitted business is advising on and arranging savings and investment products, pensions, mortgages and non-investment insurance contracts.

You can check this on the FSA's Register by visiting the FSA's website www.fsa.gov.uk/register or by contacting the FSA on 0845 606 1234.

6. What to do if you have a complaint

If you wish to register a complaint, please contact us:

In writing: Write to: Compliance Director, Unleash Advice Partnership Limited, Unleash House, 14 Gander Lane, Barlborough Links, S43 4PZ.

By email: andy@unleashadvice.com

By phone: 07885493497.

If you cannot settle your complaint with us, you may be entitled to refer it to the Financial Ombudsman Service

7. Are we covered by the Financial Services Compensation Scheme (FSCS)?

We are covered by the FSCS. You may be entitled to compensation from the scheme if we cannot meet our obligations. This depends on the type of business and the circumstances of the claim.

Investment

Most types of investment business are covered for 100% of the first £30,000 and 90% of the next £20,000 so the maximum compensation is £48,000.

Insurance

Insurance advising and arranging is covered for 100% of the first £2,000 and 90% of the remainder of the claim, without any upper limit.

Further information about compensation scheme arrangements is available from the FSCS.
