

	<b>MoneyCare Foundation</b>	<b>MoneyCare Standard</b>	<b>MoneyCare Gold</b>
Service level provided	Basic	Enhanced	Priority
Portfolio Administration provided	✓	✓	✓
Telephone and email service	✓	✓	✓
Financial organiser provided	✓	✓	✓
Talking Money magazine	✓	✓	✓
Annual bankcheck service	✓	✓	✓
Access to adviser	Financial Adviser	Senior IFA	Chartered Planner
6 monthly portfolio valuation	✓	✓	✓
Yearly review meeting	✓	✓	✓
6 monthly review meeting*	✗	✓	✓
3 monthly review meeting*	✗	✗	✓
Affluent annual diary	✗	✓	✓
Regular email update service	✗	✓	✓
Safe custody service	✗	✓	✓
Personal tax return service	✗	✗	✓

\*On request