A complementary connection

The advice and financial planning we offer can complement the range of client services you provide.

By introducing your clients to us, you can help them take a significant step towards a comprehensive financial strategy.

Downton and Ali Associates

We provide financial advice and planning for:

private clients

companies

We help clients:

- use their financial resources as effectively as possible, to help them achieve their desired lifestyle
- protect their income, assets and loved ones from financial difficulties should the worst happen
- make well-informed decisions about their financial future

Inspiring client confidence

The combined expertise of your business and ours can reassure your clients that their financial decisions are timely, well-informed and supported by trusted professionals with their interests at heart.

Reinforcing your value

Working together, we can:

- enhance your 'brand' by providing clients with access to a full financial planning service
- fulfil any duty of care by highlighting issues where further professional advice may be required
- remove risk by using a compliant client referral process
- ensure you remain as involved as necessary in the process, to enable continuity of support for clients

Co-ordinated collaboration

To establish and maintain a successful working relationship - which doesn't interfere with the running of your core business - we recommend the following steps:

1
Agree how we can best work together for the benefit of your clients.

2
Communicate the benefit and nature of our agreement with your team.

3
Initiate our agreed process for client referrals and advice.

4
Update you on progress with clients.

5
Meet at agreed times to review how we are working together.

Working together

Before we get started, we can discuss:

- the nature of our business relationship
- how to identify clients who appear to have a need for our services
- the most appropriate way to make meaningful client introductions
- how we can keep you informed of the progress we make with clients
- how we ensure all key people understand the agreement reached
- the training required on both sides to put our agreement into action
- the measures by which we will jointly assess the success of our agreement
- a schedule of meetings where we can ensure value is being achieved for all concerned
- any contracts or formalities required

If we have clients who need professional services that complement ours, we will look to refer them to an appropriate provider.

About us

We are members of Openwork, one of the UK's largest financial advice networks. We are trained to high standards and our advice is constantly assessed. Through Openwork, we have access to a range of well-known UK brands.

Our core values

1. Fair treatment of clients is central to the way we organise our business, train our staff and review our performance.
2. We provide clients with clear information and keep them up-to-date with progress during all work we carry out for them.
3. We ensure our clients know what we are going to do for them and we deliver on our promises.
4. We make sure clients understand the solutions we've implemented for them.
5. We ask our clients for feedback to ensure we meet the high standards we set for ourselves.

A mutually beneficial relationship

Our combined expertise can add an extra dimension to both of our businesses.

We value the opportunity to explore how we can collaborate to ensure your clients receive the right advice at the right time.

We can advise clients on:

- Protection
- Business Protection
- Corporate financial planning
- Mortgages
- General insurance
- Investments
- Planning towards retirement
- Taking retirement benefits
- Wealth management

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