A partner you and your clients can trust

Why we're a natural fit when it comes to client referrals.

Downton and Ali Associates

We are experienced in helping clients with their financial planning through divorce proceedings, dissolution and separation. That means you and your clients will get peace of mind that their finances will be looked after during this stressful time.

How we can add value to your business

We will work with your clients to help identify their areas of need and prioritise them before designing and implementing a plan to help keep their financial future stable. That's why we believe we're a natural fit for your business when it comes to client referrals.

Our support aims to:

- build a strategy designed to reach the goals of your client
- find any financial problems you or your client may have missed or not been aware of
- reduce any stress from your client when any difficult financial decisions occur
- help your client implement a pension sharing arrangement
- arrange appropriate life and general insurance
- ensure the financial plans we put in place are cost efficient for your client

This means you can:

- enhance your brand by providing access to pension, investment and insurance advice
- focus your energy on what you do best - helping people with their legalities
- have a compliant client referral process
- remain fully informed to enable continuity of support for clients

Mutual benefits

In order to establish a successful working relationship right from the start, it's important to discuss and agree the nature of our business relationship, how clients can benefit and what we would each want to get out of it.

This would include agreeing the process of identifying and introducing potential clients and agreeing how best to keep all parties informed following an introduction.

We can then draw up an introducer agreement and schedule in regular meetings enabling us to review progress and refine the agreement, so we continue to complement each other's services, for the benefit of clients.

How we'll work

- Consult with prospective clients
- Build a strategy for client's goals
- Arrange splitting of assets and pension sharing
- Recommend appropriate life and general insurances
- Complete the relevant paperwork
- Manage expectations by keeping all parties informed
- Make sure the plans we've recommended remain appropriate over the longer-term

About us

Our advisers have many years' experience in helping people to plan their finances, whether personal or business, and protect the financial security of their families long into the future. We are committed to giving personal, face-to-face and obligation-free financial advice built around our clients and thier circumstances.

All of Downton and Ali Associates advisers are also fully qualified, or are training towards being fully qualified to give financial advice, holding the full Financial Planning Certificate and Diploma in Financial Planning and/or the relevant mortgage advice qualifications.

The practice's ultimate aim is to create a long term relationship with all of our clients, enabling them to plan their finances whatever their requirement.

Our values

Fair treatment of clients is central to the way we organise our business, and review our performance.

We provide clients with clear information and keep them up-to-date with progress during all work we carry out for them.

We ensure clients know what we are going to do for them and we deliver on our promises.

We make sure clients understand the features and benefits of the plans we've implemented for them.

We ask clients for feedback to ensure we've met the high standards that we measure ourselves against.

Inspiring client confidence

Our combined expertise will reassure your clients their financial affairs are being properly looked after by trusted professionals, with their interests at heart.

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