

IN
THE

know



Knowing how we work should help us all work together

Telephone calls

All of our advisors work in a structured way to fulfill their many obligations to our clients.

This means that sometimes it may be difficult for them to stop what they are doing immediately to receive every call.

If your advisor is not available, please ask for your call to be returned but specify a time when this convenient for you.

In 2009, we were able to return 92% of our calls at the appointed time.

Hours of business

Our office is normally open 9am to 5.30pm, Monday to Friday.

We do not normally close for lunch unless we have a staff birthday, in which case we will be found in a local restaurant.

Outside working hours SMS messages can be sent to 07775 564921 but only in a real emergency please.

At least four times a year we close for a day for staff training.

Meetings

We can see you at home, if required but the cost of the time for travel will need to be considered.

If you are registered as disabled, we cannot make an extra charge for travel.

We try to coincide other meetings to help absorb the cost of travelling.

If you can meet at our office we ask you first make appointment in case your advisor has been drawn out of the office.

2009

87% of new clients
came to us by
referral

We hope that you too will be satisfied with our work for you and that you will feel confident in recommending us.

Coming here

We can be found at 45 High Street Sevenoaks.

We are based on the first and second floors of an historical building which does not have a lift.

If you have trouble with stairs, please discuss this with us before coming here.

Our selection of biscuits, tea and coffee is enjoyed by many a client.

You will receive a telephone call on the working day before a meeting to confirm the arrangements.

If you cannot attend will you please call us? 01732 442043

We do not have parking facilities at the office; sorry.

We are aware that some of our regular clients use the car park to the near opposite Waitrose supermarket which gives 90minutes of free parking.

We would, of course, recommend the supermarket at its extensive range of goods.



Not-knowing

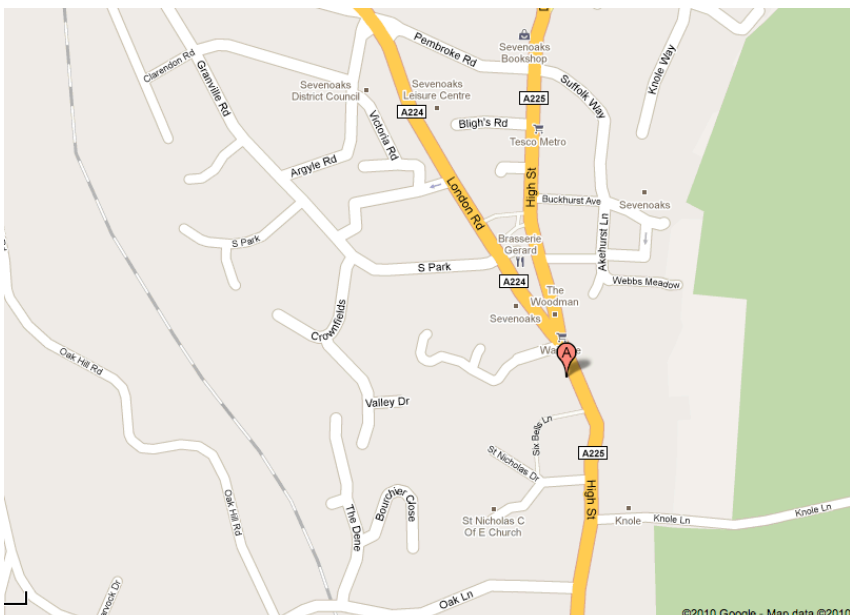
The 'Not-Knowing' factor is something everyone has experienced.

Waiting for a plumber to call, a delivery to arrive or a someone to return a call; they are all the same and the cause of frustration.

We will endeavor to keep you in touch whenever appropriate. The key thing to remember is that we shall try settle into a routine of communication which you are satisfied with but don't ever tolerate 'not knowing' , we wouldn't!.

BDL On-line

This is our single-most popular tool with our existing clients. Using high-end security, we allow you access to your file so you can see the latest developments and contribute to it as appropriate.



DID YOU KNOW?

Contrary to popular myth, the town is not named after the seven oak trees that lined the boundary of the Vine Cricket Ground, six of which were destroyed in the Great Storm of 1987. Those trees were one of several sets of seven oaks around the town and date from 1902 when they were planted to commemorate the Coronation of King Edward VII....ANDIn September 2006 it was revealed in a local newspaper and by Kent Police that Sevenoaks was one of the safest places in Kent to live in.....AND....Noble natives of Sevenoaks include H G Wells, Peter Sissons, John Humphreys, Andy Titterrell and Jeffrey Amherst, 1st Baron Amherst, Colonial Governor of Massachusetts?