

Our promise to you



CITRUS
FINANCIAL

*A fresh approach to
financial advice and planning*

We will always ...

- put you first and make you feel part of the Citrus family
- be professional and ensure any advice is given by fully qualified, trustworthy advisers
- act in your best interests at all times
- provide an excellent level of service in an accurate and compliant manner and never mislead or take advantage of you
- be polite, friendly and respectful
- care for you and never make you feel that you are a nuisance
- look beyond your immediate needs, take into account your whole situation and then build a relationship with you for the long term
- communicate with you in plain English to ensure you fully understand any process or advice
- treat your personal details in a confidential manner
- deliver what we promise and respond to all enquiries promptly
- get the basics right
- have a cheerful and a positive attitude
- put you, our valued clients, first