

Church House

Private Bankers

keyfacts®

about our services

Church House Investments Ltd
3 Goldcroft
Yeovil
Somerset
BA21 4DQ

1. The Financial Services Authority (FSA)

The FSA is the independent watchdog that regulates financial services. It requires us to give you this document. Use this information to decide if our services are right for you.

2. Whose products do we offer?

- We offer our own products; you can ask us for a list but our recommendation will be made following an analysis of the whole market
- We can only offer products from a limited number of companies. These include our own product(s) but our recommendation will be made following an analysis of our entire range of products. Ask us for a list of the companies and products we offer.
- We only offer our own products

Church House Investments Ltd. 3 Goldcroft, Yeovil, Somerset BA21 4DQ
Tel: 01935 382620 Fax: 01935 382629 www.church-house.co.uk

Registered in England · Number 3475556

The group's banking activities are conducted by Church House Trust Plc. Investment management is conducted by Church House Investments Ltd. Both are authorised and regulated by the Financial Services Authority. The registered offices are 3 Goldcroft Yeovil Somerset BA21 4DQ

3. Which service will we provide you with?

We will advise and make a recommendation for you after we have assessed your needs.

You will not receive advice or a recommendation from us. We may ask some questions to narrow down the selection of products that we will provide details on. You will then need to make your own choice about how to proceed.

We will provide basic advice on a limited range of stakeholder products and in order to do this we will ask some questions about your income, savings, and other circumstances but we will not:

- conduct a full assessment of your needs;
- consider whether any other product outside the range we offer may be more suitable

4. What will you have to pay us for our services?

Before we provide you with advice, we will give you our keyfacts guide 'about the cost of our services'.

We will tell you how we get paid, and the amount, before we carry out any business for you.

5. Who regulates us?

Church House Investments Ltd 3 Goldcroft, Yeovil, Somerset BA21 4DQ is authorised and regulated by the Financial Services Authority. Our FSA Register number is 190548. Our permitted business is to establish, operate or wind up personal pension schemes and to advise on investments

6. Loans and ownership

Church House Investments Ltd is a wholly owned subsidiary of Church House Trust Plc which is authorised and regulated by the FSA, registered number 204459

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7. What to do if you have a complaint

If you wish to register a complaint, please contact us:

...in writing Write to Judith Palmer, Group Compliance Officer, Church House Investments Ltd, 3 Goldcroft, Yeovil, Somerset, BA21 4DQ

...by phone Telephone 01935 382613

If you cannot settle your complaint with us, you may be entitled to refer it to the Financial Ombudsman Service.

8. Are we covered by the Financial Services Compensation Scheme (FSCS)?

We are covered by the FSCS. You may be entitled to compensation from the scheme if we cannot meet our obligations. This depends on the type of business and the circumstances of the claim.

Most types of investment business are covered for 100% of the first £30,000 and 90% of the next £20,000 so the maximum compensation is £48,000.

Further information about compensation scheme arrangements is available from the FSCS.

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