



We're Here to Help

We're sorry if something hasn't gone as expected. Your feedback matters, and we're committed to resolving your concerns quickly, fairly, and with care.

Complaints Procedures

What to Expect When You Raise a Complaint

STEP 1: Acknowledgement



- We receive your complaint and acknowledge it promptly, generally, within 5 working days.
- You will be provided with written details of our complaints handling procedures.
- Where we are able to provide a final response immediately, this will be sent with our acknowledgement.

STEP 2: Investigation



- We will gather all the information we need to investigate your concerns thoroughly.
- We will keep you informed of the progress of the investigation.
- You will be assigned a designated complaints handler.

STEP 3: Resolution



- We aim to resolve your complaint quickly and fairly.
- We will either send a final response within 8 weeks.
- Where this is not possible, at the end of that period, we will explain that we are not able to make a final response, giving reasons for the delay and indicating when we expect to be able to provide a final response.
- We will inform you whether you are entitled to refer the complaint to the Financial Ombudsman Service (the 'Ombudsman') if you are dissatisfied with the delay.
- We will enclose a copy of the Ombudsman's explanatory leaflet.

STEP 4: Final response



- We will send you our final answer to your complaint.

We will either:

- Uphold the complaint and, where appropriate, offer redress or
- Reject the complaint and give reasons for doing so.

Our final response will advise you whether you may refer your complaint to the Ombudsman if you are not satisfied with our response.



How to contact us

You can raise a complaint in whichever way suits you best:

- 01275 813700
- complaints@clifton-asset.co.uk
- Clifton Wealth Partnership Ltd.
The Pavilions
Eden Office Park
Ham Green
Bristol
BS20 0DD

Let us know if you need help submitting your complaint, we're always happy to assist.



Accessibility

We can provide this procedure in:

- ✓ Large print
- ✓ Audio format
- ✓ Easy-read summary
- ✓ Other languages (on request)

Help us improve

Once your complaint is resolved, we'd love to hear how we did. Your feedback helps us serve you better.

If you're not satisfied

If we haven't resolved your complaint within 8 weeks, or you're unhappy with our final response, you can contact:

Financial Ombudsman Service

- Exchange Tower, London E14 9SR
- 0800 023 4567
- www.financial-ombudsman.org.uk

They offer free, impartial help.

Where you wish to do so, you should do so within 6 months (from the date the final response was issued) as your complaint may otherwise be time-bared under the Ombudsman's rules.

Our Regulatory Information

Clifton Wealth Partnership Limited is authorised and regulated by the Financial Conduct Authority. Registered in England and Wales No. 07487477. Registered office: The Pavilions, Eden Park, Ham Green, Bristol, BS20 0DD. FCA Firm Reference Number: 541273. Clifton Wealth Partnership Limited is a wholly owned subsidiary of Clifton Asset Management Ltd.

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