



# **Russell & Co.**

## *Independent Financial Advisers*

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Our Ref: BR/ME/

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Mr P E Lisewski  
2nd Floor  
40D Gledstanes Road  
Barons Court  
London  
W14 9HU

Dear Paul

### **RUSSELL & CO INDEPENDENT FINANCIAL ADVISERS**

I am delighted to be writing to all of our clients to introduce our new business of Russell & Co Independent Financial Advisers, which is in the process of being approved by the Regulator, the Financial Services Authority, under direct authorisation.

Many of you will know that Brian is already a fully qualified Independent Financial Adviser, but our new business now boasts two additional Independent Financial Advisers, Peter Bergman and Grant Connell. Enclosed is our new brochure that sets out details of both our Independent Financial Adviser practice and also our Accountancy practice. This is an updated version of what you were sent time ago.

With the introduction of the new IFA business we intend to carry out at least an annual review of financial matters for all clients. In certain cases, meetings will be scheduled more frequently than this. Not only will we be in a position to look at your financial circumstances and give independent advice free of charge, but we will also be able to collect and assemble many of the details that are required in order for us to complete your tax return form each year.

All that will be needed in due course, is a little of your time which can be spent either here, or by visiting you at home, to carry out the review process. Let me assure you, that these additional services are free of all charges. This is a continued support and service level to all our clients.

So far as this new service is concerned, Grant Connell has been allocated to your file and will make contact in due course to arrange a suitably convenient time and date to meet, so that he can obtain further information. So far as your existing accountancy affairs are concerned, these remain completely unchanged.

Naturally, if you do have any initial queries or questions, or if you would like Grant to contact you as a matter of urgency, then please feel free to make contact at your convenience.

Yours sincerely

Andy Russell