



OUGHTRED & HARRISON
FINANCIAL SERVICES

OHFS

OUR TEN WORD STORY

At OHFS Limited we offer both existing clients and potential new clients:
TRULY INDEPENDENT, HIGHLY QUALIFIED, CLIENT FOCUSED, ADDED VALUE,
FINANCIAL PLANNING.

◆ Truly Independent

We are not owned or partly owned by any Product or Service Provider which allows the freedom to select products and services from the whole of the market to most appropriately fit the financial planning requirements of our clients without any conflict of interest.

◆ Highly Qualified

Chartered financial planners, including a Certified Financial Planner, two Fellows of the Chartered Insurance Institute and a Fellow of the Personal Finance Society concentrated within our small team makes us one of the highest qualified financial planning firms in Yorkshire. Certification of the highest standards of professional capability.

◆ Client Focused

The client is at the heart of everything we do. We believe that financial planning is a lifelong journey where we will demystify the fog and guide our clients throughout the journey, not simply, "flog" one or more policies. Journeys are more complicated when not accompanied and accompanied by a trusted adviser results in "the most appropriate decisions" being made.

◆ Added Value

Our long term relationship with clients provides continual access to advice – be it by, telephone, e-mail, snail mail, or a chat over coffee, or a formal meeting to discuss strategy. We would want to meet formally at least one per year and more frequently for more complicated planning.

◆ Financial Planning

We offer a comprehensive Financial Planning service to help clients achieve their desired future lifestyle. Our latest technology assists in the analysis of current circumstances, the defining of future objectives and the development and implementation of action plans.



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