

Client Service Standards Statement

Our Commitment

To provide Financial Advice on Insurance Products to our Clients in accordance with the Code of Professional Conduct for Financial Advice Services.

Treat Clients Fairly

We will respect our clients by listening to their needs, considering their individual requirements, responding in a timely manner, communicating clearly and concisely, without pressure.

Act with Integrity

We always have your best interests at heart and will work with you to tailor an Insurance solution that meets your needs. We will be open with all information required to assist you in making an informed decision based upon your individual circumstances.

Give Advice that is suitable

We have access to a wide range of Insurance Products and will take the time to arrange appropriate cover without unnecessary add-ons. We do so by getting to know your requirements and tailoring your Insurance Cover accordingly.

Ensure that the Client understands the Financial Advice

At Trevor Sutcliffe Insurance Limited it is our goal to find the right solution with minimum fuss. We will communicate our recommendations to you in a way that you understand and demonstrate how these fit your individual needs.

Protect Client Information

The protection of your privacy is important to us. We are committed to collecting, holding, and using your personal information for insurance related purposes only in a professional manner, and acting in accordance with the Privacy Act 2020.