The Brookwood Charter

At Brookwood, for almost 40 years we have believed successful client relationships are built upon trust, shared responsibility and mutual respect.

As your advisers/agent, we have responsibilities to you, to our team, to our profession and to HMRC as a regulated practice.

As our client, you have responsibilities to yourself, your business, your employees, HMRC and to us as your trusted advisers.

This Charter sets out the commitment we make to each other because great advice only works when adviser and clients work together.

Trust + Responsibility = A Partnership.

Our Commitment to You

We will:

• Act with integrity, professionalism and independence.

• Provide personalised advice that is clear, practical and honest.

• Protect your interests whilst meeting our legal and professional obligations.

• Help you understand your numbers, obligations, opportunities and risks.

• Treat you with respect and value the trust you place in us.

• Invest in our people, systems and knowledge so that we continually improve.

• Be courageous enough to tell you what you need to hear, not simply what you want to hear. You may not like the answers but rest assured they are carefully considered.

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Your Commitment to Us

In return you agree to:

• Be open, honest and transparent.

• Provide complete and accurate information when requested.

• Take responsibility for your decisions and obligations.

• Respect agreed timescales and deadlines.

• Acknowledge delays have implications and inherent costs and that the quotes you receive are based on your timely and accurate responses.

• Value professional advice and seek clarification when needed.

• Treat our team with courtesy, professionalism and respect.

• Raise concerns promptly so that we can address them together.

Our Shared Commitment

Together we will:

• Work together to achieve the results you require and/or want.

• Build relationships based on trust.

• Meet our obligations responsibly.

• Communicate openly and honestly.

• Solve problems constructively.

• Create confidence, certainty and opportunity.

Contact@Brookwood.co.uk

01865 84 22 66

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