

Qualities of a Trusted Adviser

Communication

At Positive Dynamics, you can expect an exceptional level of communication from our team who take due care to explain things to you in a simple and clear way that is easy to understand, no matter how much experience you have with financial planning. We will go the extra mile to ensure that you fully comprehend what is going on with your affairs and are happy to spend the time to give you a clear understanding, often using diagrams and visual tools to illustrate our strategies in a practical manner.

Listening

At Positive Dynamics you can trust that we will listen closely to fully understand any concerns you may have, which will be carefully considered before any advice is given. Our experienced and attentive advisers will be sure to listen to any questions you may have and deliver educated responses which define and address the problem, as opposed to guess the solution.

Identifying and Understanding Needs

Understanding your position, both personal and financial, is the first step our advisers will take in developing your tailored financial plan. We will ask you open-ended questions which require more than a yes or no response, encouraging you to think carefully about what you want to achieve, and separate logic from emotion. This fundamental step will ensure that all advice provided is relevant to your personal circumstances and focused on getting you closer to your financial goals and objectives.

Building Rapport

Our approachable and confident team members will ensure that you can be at ease throughout the whole financial planning process, from first meeting to ongoing service. Your financial goals and needs are our number one priority. From the first encounter our adaptable advisers will put you at ease to establish a trusting relationship and work towards delivering a tailored service which best suits your individual needs and circumstances.

Empathy

Advising, explaining, encouraging, empathising, and being interested in you as a person not just a client – this is what you can expect from a Positive Dynamics financial adviser. We pay close attention to all of your needs, both financial and personal, providing moral and emotional support as well as financial advice.

Caring and Being Genuinely Interested in Clients

At Positive Dynamics, our advisers possess professional and personal qualities which make you feel important, showing a genuine interest in all aspects of your lives and not just your finances. You will be treated like a family member or friend not just a client, and can be confident that we will treat all matters as important no matter how big or small.