

# 365 INVESTMENT MANAGEMENT

## Treating customers fairly policy

At all times 365IM are committed to provide the highest standard of service, conduct themselves with the utmost good faith, integrity, dignity, respect, and always have regard for the well-being of all our clients, in particular all vulnerable clients. All our actions are guided by the principle of **always placing the interests of our clients above our own**.

When dealing with vulnerable, or potentially vulnerable, clients, we always advise such clients to invite a trusted friend or member of their family to take part in meetings and ensure they receive copies of all written communications. We will always exhibit flexibility, empathy, consideration, never take advantage of our clients, and always communicate clearly, in plain English and without the use of terminology or jargon.

We provide our clients with the service or products they have paid for, always inform them of all charges before they are incurred, and at all times apply our best endeavours to resolve any issues as quickly as possible. Our clients can expect our interaction to be polite and courteous and our team members are trained in treating clients fairly, respecting their dignity and privacy at all times. Communication in large print or Braille will be produced, if necessary, and we ensure the pace and duration of any interview/meeting is commensurate with our clients' capabilities. Home visits are undertaken when appropriate.

All our team members are appropriately trained and qualified for their respective roles. They are remunerated and incentivised in ways which encourage dealing with clients fairly and impartially and continually endeavour to improve the services provided to them. If any clients complain about any aspect of 365IM's services, their complaint will be handled professionally, impartially and in accordance with the FCA rules.