

# Principle First To Offer Remote Financial Advice



Released on: February 25, 2010, 5:52 am

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Industry: [Financial](#)

Principle First now offers clients the ability to interact with an adviser online, as they are brought across to his screen to discuss their financial plan using a range of graphical tools, charts and graphs illustrating their proposed or current investments.

Principle First's remote financial advice service has already been rolled out as a pilot project, and has passed the test with flying colours.

Gareth Flanagan, founder and managing director of Principle First, said: "Our clients have already given our remote advice service a very strong 'thumbs up'.

"I think people love the idea of tending to their future and current financial planning from the comfort of their own home."

A potential client can log onto the Principle First website to make an [investments](#) enquiry.

The Principle First remote advice service offers visual and graphical illustrations to complement discussions on mortgages, life insurance, tax planning and savings as well.

Gareth Flanagan added: "The real beauty of remote financial advice is its ability to cut through the resistance of many consumers to visit a financial adviser.

"It's amazing to think that only 20% of consumers seek and accept free, no-obligation help with their [financial plan](#) and pensions. Many of those consult only banks and building societies who, due to their limited product range, place their funds in the worst-performing sectors."

Principle First has found that this resistance is based on three erroneous beliefs, which undermine a customer's self-confidence in approaching an adviser.

Consumers often believe that [financial planning](#) is only for the wealthy, and that they simply do not have enough wealth to justify the attentions of a professional financial adviser.

Another self-intimidating belief is the nervousness the client may feel at his or her lack of financial knowledge.

The third barrier to seeking advice may be a negative experience with another adviser in the past. This is a legacy of the days when financial services was a sales-driven business, and advisers had a low level of training and qualification. The culture of the financial services industry was a sales culture, rather than the information and advice-led culture that prevails today.

As chartered financial planners, Principle First seeks to listen, consider and present the client with top-quality financial advice specifically tailored to their personal situation, and relevant to their circumstances, both in the moment, and as they change through the years. Principle First also provides a [corporate financial advice](#) service to businesses.

### **About**

### **Principle**

### **First:**

Principle First Financial Services is one of the leading UK independent financial advisers, advising on all areas of financial planning, such as pension and retirement planning, savings and investments, family protection, mortgages, and inheritance and tax planning. In 2008, Principle First became one of the few financial adviser firms to achieve the status of Chartered Financial Planners, the UK's 'gold standard' in financial advice.

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Press release distributed via EPR Network (<http://express-press-release.net/submit-press-release.php>)