OUR SERVICE PROPOSITION

DEFENDING YOUR FINANCIAL ASSETS FOR THE FUTURE

Our strategy is to bring together our clients' financial aspirations, concerns and responsibilities and give as much help as is needed.

We believe our Private Client service is unique in offering comprehensive financial planning, tax advice and wealth management provided by personal specialists, co-ordinated by one advisor, all in one place.

You cannot decide on a strategy without a plan. You cannot have a plan without deciding what lifestyle you want. We offer comprehensive cash flow modelling (plus regular review meetings) to help clients identify, achieve and maintain their desired future lifestyle without the fear of running out of money.

How do you use your assets in the most efficient way to achieve your future plans? Our experienced advisors are always on hand with expert advice on all aspects of financial planning - including investments, protection and pensions. Our clients can be as hands-on or hands-off as they want. We are available to talk whenever they like.

What are the tax implications of your preferred financial plans? Our tax and financial planning advisors work closely together so we can implement our clients' financial plans, taking investment and tax issues into account. We provide advice on all aspects of tax: highlighting areas for current tax savings, suggesting planning opportunities to reduce future tax bills and guiding clients through the compliance responsibilities associated with their tax return.

Many feel that is it becoming ever more complicated to manage investments. With our Investment Management service we can deal with all the tricky stuff - portfolio construction, portfolio monitoring and regular portfolio re-balancing. Investors receive regular portfolio valuations and have on-line portfolio access.

For more details visit -

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