

Our wealth management team provide you with specialist, focused independent advice on all aspects of financial planning to help you choose the right strategy to **maximise the potential benefits of your wealth throughout your life.**

Our team of specialists take time to consider the future for you and your family. Guiding you to choose the most effective options to support you to:

- **save for school fees and cope with the mounting costs of higher education**
- **discover the most tax-efficient savings options for your situation such as ISAs or Unit and Investment Trusts, Insurance Bonds and other savings, growth or income products**
- **efficiently plan for your retirement to be comfortable and active**
- **dramatically increase the amount of money left to your family through inheritance tax planning**

Businesses and business owners also benefit from sound financial planning to encompass pension and employee benefit schemes, corporate investments, financial protection and insurance policies that can develop a strategy to help ensure future stability and success.

Our initial consultations will assess your appetite for risk, investment horizons, performance targets and tax requirements so we can establish the correct portfolio for your needs. With regular assessments and pro-active management our impartial advice will maintain the momentum of your savings and investments to help you achieve your life ambitions.

**To start building confidence in your future, please call and speak to one of our wealth management consultants on 01904 544300**