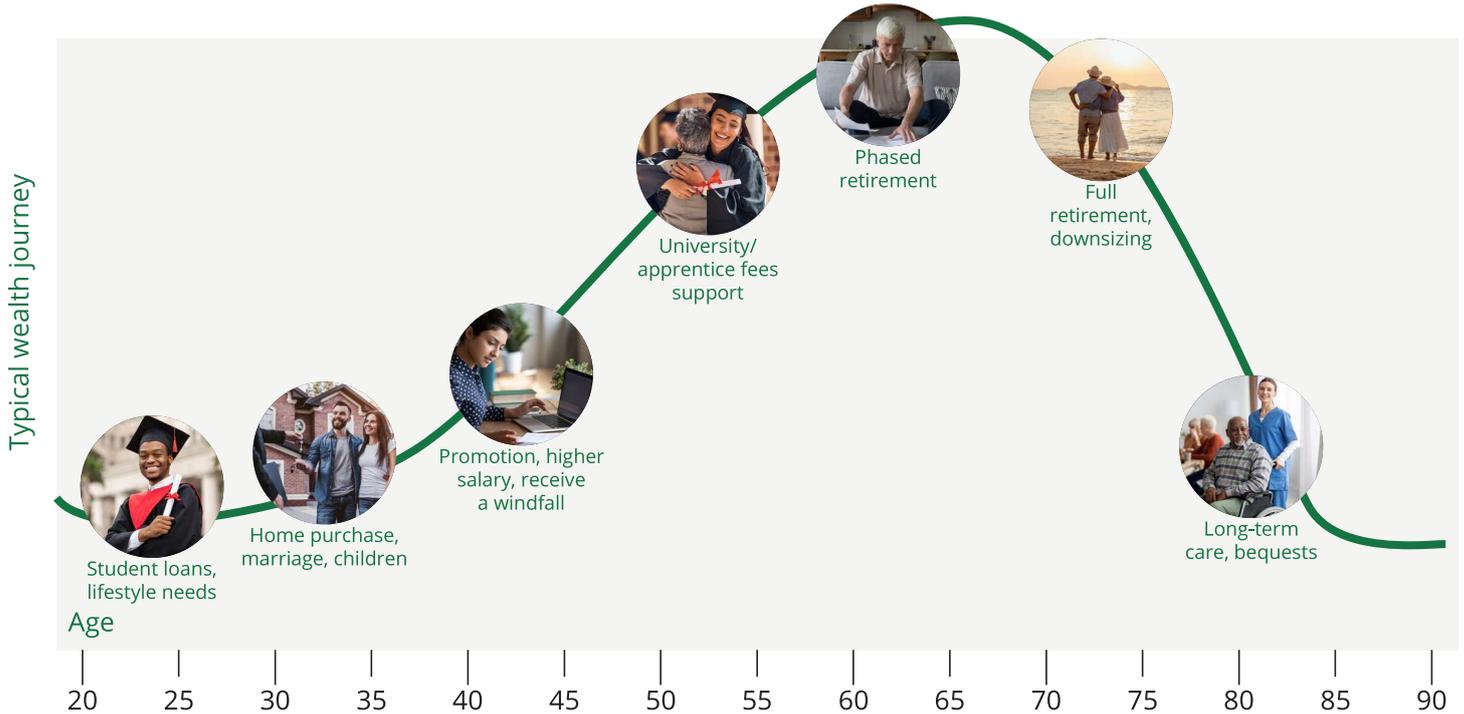


How we can help at every stage of your financial life



Services you may need at different stages of your life

Wealth preservation

Estate planning, succession planning, trusts, key business person

Retirement planning

Pension funds, personal funds, company or trustee funds

Personal and business protection

Life cover, critical illness cover, income protection cover, business cover

Wealth management

Savings, investments, tax planning, retirement planning

Cash management

Savings accounts, emergency funds, financial planning

Areas we can advise you on:

Protecting wealth

Protecting you and your family's standard of living against the unexpected.

Creating wealth

Ensuring you maximise your standard of living for when you do not want to work so hard.

Managing wealth

Making the most of tax-efficient investment opportunities so that money is available when you want to spend it.

Property wealth

Ensuring suitable arrangements for your home, second home, buy-to-let or commercial properties (commercial properties are by referral only).

Business wealth

Helping small and medium-sized enterprises to grow and become more profitable.

Retaining wealth

Retaining more of your hard-earned money legally and ethically.

Preserving wealth

Preserving the value of your estate for your loved ones.