

Our Proposition



WHO WE ARE

- Established 2001
- Independent – whole of market
- Professional advisers
- Based in Esher
- Focused/concentrated on advising clients of solicitors & accountants
- Qualified
- Experienced

WHAT DO WE DO

- Fee based, with commission offset
- Creative appropriate solutions
- Explanations plain talking / plain speaking
- Ongoing service, annual reviews including valuations
- Specialise in investments, trusts, pensions and tax efficient solutions
- Financial analysis and plan
- Communications with other professionals
- Portfolio reviews
- Client Reports

OUR RELATIONSHIP WITH YOU

- Relationship based not transactional
- Trust
- Leadership
- Understanding your position, goals, aspirations and risk profile
- Accessibility
- Individual
- Personal touch
- Face-to-face meetings
- Communications

HOW WE DELIVER OUR SERVICE

- Teamwork
- Technology
- Document management
- Client newsletters
- Client reports
- Client folders
- Personal service
- Web access