

essentiallyfinancial

planning for life

BIG PICTURE

- Establishing your real objectives
- Maintaining independence
- Preserving capital

FUTURE STRATEGIES

- Ensuring tax effective income
- Health issues

FAMILY OFFICE

- Wealth planning
- Reviewing your will
- Minimising inheritance tax
- Use of trusts
- Estate assets

INVESTMENT PRINCIPLES

- Market research, evaluation and analysis
- Short, medium and long term
- Alternative investments
- Rebalancing portfolios

STRAIGHTFORWARD COMMUNICATION

- Clear explanations
- More effective decision making
- Taking control

REMOVING THE HASSLE

- Taking the complexity and hassle out of administration
- Second opinion

PROFESSIONAL SUPPORT

- Providing updates to your accountant or other professional adviser
- Supplying end of year taxation information
- Recommending suitable professionals as needs arise

ANNUAL REVIEW

- In-depth face to face annual review meeting

PRIORITY RESPONSE

- Telephone and email access to your adviser
- Face to face access with your adviser between review dates

POST

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