



Key Client Outlines

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Here are some brief outlines of the clients we work best with:

Family income of greater than £150,000 pa

Investable assets (pensions, investments or real estate) of greater than £500,000

Business Owners

Generic Profile

- ▷ Owners of small to medium-sized businesses
- ▷ No specific industry
- ▷ Trading profitably
- ▷ Family focused

Potential issues

- ▷ Looking to create wealth outside the business
- ▷ Interested in owning offices or factories in self-managed pensions
- ▷ Seeking independent advice on existing retail pensions
- ▷ Requiring investment education and advice
- ▷ Contemplating a sale or other capital event
- ▷ Recently had a sale or other capital event
- ▷ Key person insurance issues
- ▷ Equalising equity and wealth during a transfer of family ownership (between siblings)
- ▷ Work out “how much is enough?”
- ▷ Estate planning advice (strategic advice before the involvement of a solicitor)

Executives

Generic Profile

- ▷ Senior managers or executives
- ▷ Up and coming junior managers or executives with ambition and prospects
- ▷ Family focused

Potential issues

- ▷ Looking to create wealth outside of company pensions and share options
- ▷ Seeking independent advice on existing company pensions and share options
- ▷ Requiring investment education and advice
- ▷ Wanting a trusted adviser to project manage and guide their financial plan (because they are time poor)
- ▷ Work out “how much is enough?”
- ▷ Estate planning advice (strategic advice before the involvement of a solicitor)

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Selecting a Financial Planning Partner

Professionals

Generic Profile

- ▷ Partners in major firms
- ▷ Owners of boutique professional firms
- ▷ Up and coming junior partners with ambition and prospects
- ▷ Family focused

Potential issues

- ▷ Looking to create wealth outside of their professional partnership
- ▷ Seeking independent advice on existing pensions and investments
- ▷ Requiring investment education and advice
- ▷ Wanting a trusted adviser to project manage and guide their financial plan (be cause they are time poor)
- ▷ Work out “how much is enough?”
- ▷ Estate planning advice (strategic advice before the involvement of a solicitor)

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