

Services

Investments

- Expert individual fully-personal investment advice
- Investment bonds
- Unit trusts / OEICs and investment trusts
- Individual Savings Accounts (ISA)
- Offshore investment
- Investing for Trustees

Protection

- Life assurance
- Critical illness protection
- Income protection insurance
- Mortgage Payment Protection Insurance
- Private medical insurance

Asset Defence

- Inheritance Tax mitigation*
- Protecting your life savings against demands for local authority care charges
- Protecting your family home for your children
 - Retirement Planning, Home Reversions and Equity Release
- Reviewing your existing pension plans
- Arranging Annuities and Drawdown

- Self Invested Personal Pensions Business Financial Planning
- Key employee and directors' cover
- Partnership protection

- Helping business owners to buy their own commercial premises
- Auto enrolment advice to comply with workplace pensions regulations

*The Financial Conduct Authority does not regulate advice on taxation or commercial loans.