



Financial Shortcuts



Unearthing the full potential of your pensions



Nurturing the growth of your investments



Ensuring your assets are protected



FSPs, the truth behind the myth

Financial confidence bydesign

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Our
unique
way of
working



Financial
confidence
bydesign

Client Level - Financial Mastery

Financial Shortcuts

Your Growth

<div>AAdvanced</div> <div>Deeper connections and experience</div> <ul style="list-style-type: none">Tools(Laboratory)Lifetime Allowance protectionLifetime Allowance trackerDrawdown trackerFinancial forecastWealth forecast	<ul style="list-style-type: none">Income in retirementStay in pension, or not?Lifetime Allowance excess treatmentDrawdown, how it worksLifetime Allowance trackerDeathPowers of Attorney x2Protection for familyInvestment fraud risk testsEIS VCTBookFinal Salary Pension transfer	<ul style="list-style-type: none">Better better betterPeace, freedom of mindLegacy to familyConfidence that you're maximising every piece of tax, every nook and crannyTicking correct boxesUse tax tips / allowancesWatch assets grow
<div>BIntermediate</div> <div>Added extras</div> <ul style="list-style-type: none">Asset valuation trackerBCI	<ul style="list-style-type: none">State pension forecast / gapsAnnual allowance testsPension contributionsAnnual allowanceCash release from pensionsPlanningForecastsLifetime Allowance tests / valuePension - Death nominationsAsset analysis	<ul style="list-style-type: none">Growth as an individualFocus on work / professionPartnership where others are looking after your financesProactivePlanned aheadFocus on riskDon't make dumb decisions with money, assets / riskUnderstand how markets work
<div>CBasic</div> <div>Compliance, commoditising</div> <ul style="list-style-type: none">MandatoriesFoundation levelCompliance	<ul style="list-style-type: none">Understanding of financial estateHow much do I spend?How much do I earn?How do I save?Defined Contribution pension auditISA top upsEmergency fund, bills and expenses controlledBed + ISASaving into banksSet up bankBest cash ratesUnit trustsFaster, easier, cheaper	<ul style="list-style-type: none">Growth of savingsRegular savingsPurpose to moneyMore income than expensesClear up messesFinancial systemUnderstand what you have, value itStart savingHow to saveOvercome embarrassment

● Pensions

● Protection

● Investments

● Final Salary Pensions