Chartered Financial Planners

Pension TRANSFER Gold Standard

Introducing our

Financial Planning & Wealth Management Service

ArmstrongWatson®

Financial Planning & Wealth Management

www.armstrongwatson.co.uk

Helping our clients achieve prosperity, a secure future and peace of mind.

Welcome

Welcome to Armstrong Watson Financial Planning and Wealth Management.

We are the regulated financial advice division of the Armstrong Watson group which has been advising, supporting and protecting clients across the North of England and South West Scotland for over 50 years.

We have highly qualified, experienced advisors in each of our office locations in Cumbria, Northumberland, South Lakes, Yorkshire and Scotland.

We are proud to be a firm of Chartered Financial Planners and recognised by the Chartered Insurance Institute (CII) as an organisation that demonstrates significant commitment to an overall standard of excellence and professionalism.

This commitment to service and quality of advice has led us to now managing client wealth of over £900m.

Our approach

Our approach is to step into our client's shoes and see their personal or business situation from their perspective, allowing us to have a clear understanding of their aspirations and objectives. This understanding helps us shape our advice and provide an effective, and most importantly, a personalised planning service to all our clients.

Knowledge of our clients' objectives helps us develop a clear financial strategy that can evolve with their changing circumstances. Reviews on an on-going basis allow us to accommodate changes and developments as required.

Being part of the Armstrong Watson group means that we have strength in numbers, enabling us to work alongside in-house accountants, business advisers and service specialists to ensure that our clients benefit from the expertise of trained professionals. We also work alongside our clients' existing professional advisors to ensure that they receive a co-ordinated approach.

Helping our clients achieve prosperity, a secure future and peace of mind.

...we're with you

Our advice process

No two people or businesses are the same. Whilst there may be some similarities, just like people, each situation is unique.

There is now an ever increasing range of financial solutions available and information can be accessed far more easily with just the touch of a button.

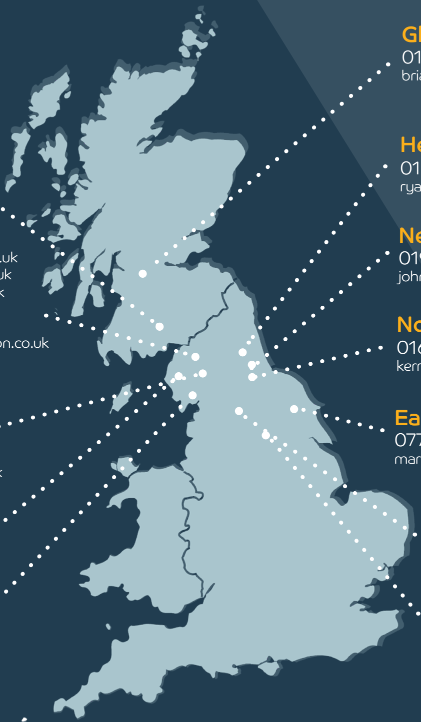
Of course, the challenge is how you identify what the right strategy is for you. This is where we can work with you to ensure that you have a plan focused on achieving your goals and aspirations.

Our Financial Planning Consultants can speak to you remotely by video as well as face to face. We also have a telephone based service for clients who prefer this method of communication.

Our fees

The fees for an initial meeting will be covered with our compliments and at the end of this first meeting we will be in a good position to assess how well we have understood your needs and be very clear on how we are able to help you. You will also be aware of the work involved in addressing your objectives.

We operate on a no surprises philosophy, so prior to starting work we will agree our fees with you. In order to ensure that you only pay fees for the specific advice you want, we break our fees down to match the three phases of our advice process – strategy, implementation and ongoing review – so that you are aware from the outset what costs are involved.



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